REPORT RESUMES

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STENOGRAPHIC, SECRETARIAL, AND RELATED OCCUPATIONS, A SUGGESTED CURRICULA GUIDE.

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THE PURPOSE OF THIS GUIDE IS TO ASSIST THOSE INVOLVED IN ADMINISTERING FULL-TIME, PART-TIME, REFRESHER AND UPGRADING, AND MANPOWER DEVELOPMENT AND TRAINING PROGRAMS IN STENOGRAPHIC, SECRETARIAL, AND RELATED OFFICE OCCUPATIONS IN HIGH SCHOOLS, POST-SECONDARY, AND SPECIAL SCHOOLS. IT WAS PREPARED BY C.E. LESLIE AND ASSOCIATES UNDER CONTRACTUAL ARRANGEMENTS BETWEEN THE U.S. OFFICE OF EDUCATION AND MCGRAW-HILL, INC. JOB DESCRIPTIONS, OCCUPATIONAL PREREQUISITES, AND SUGGESTED TRAINING ARE GIVEN FOR CLERK-STENOGRAPHER, COURT REPORTER, NOTE READER OR STENOTYPE OPERATOR, STENO-POOL SUPERVISOR, ENGINEERING STENOGRAPHER, FOREIGN-LANGUAGE STENOGRAPHER, LEGAL STENOGRAPHER, MEDICAL STENOGRAPHER, POLICE STENOGRAPHER, PRINT SHOP STENOGRAPHER, PUBLIC STENOGRAPHER, SCIENTIFIC STENOGRAPHER, EDUCATION SECRETARY, ENGINEERING SECRETARY. EXECUTIVE SECRETARY, FOREIGN-LANGUAGE SECRETARY, LEGAL SECRETARY, MEDICAL SECRETARY, POLICE DEPARTMENT SECRETARY, SCIENTIFIC SECRETARY, AND SOCIAL SECRETARY. THIRTY-TWO GENERAL, 23 SPECIALIZED, AND FIVE ADMINISTRATIVE OFFICE EDUCATION UNITS ARE PROVIDED FOR THE SUGGESTED TRAINING. EACH PRESENTS CLASS HOURS, TEACHING SUGGESTIONS, STANDARDS OF STUDENT ACHIEVEMENT, PREREQUISITES, TOPIC OUTLINES, AND SUGGESTED TEXTS AND OTHER TEACHING MATERIALS. A SUGGESTED LESSON PLAN, PHYSICAL FACILITIES REQUIREMENTS, AN EXAMPLE OF A TYPICAL LAYOUT OF CLASSROOMS AND LABORATORIES, AND SOURCES OF EDUCATIONAL MATERIALS ARE INCLUDED IN THE APPENDIX. THIS DOCUMENT IS AVAILABLE AS FS5.286--86001 FOR $1.50 FROM SUPERINTENDENT OF DOCUMENTS, U.S. GOVERNMENT PRINTING OFFICE, WASHINGTON, D.C. 20402. (PS)

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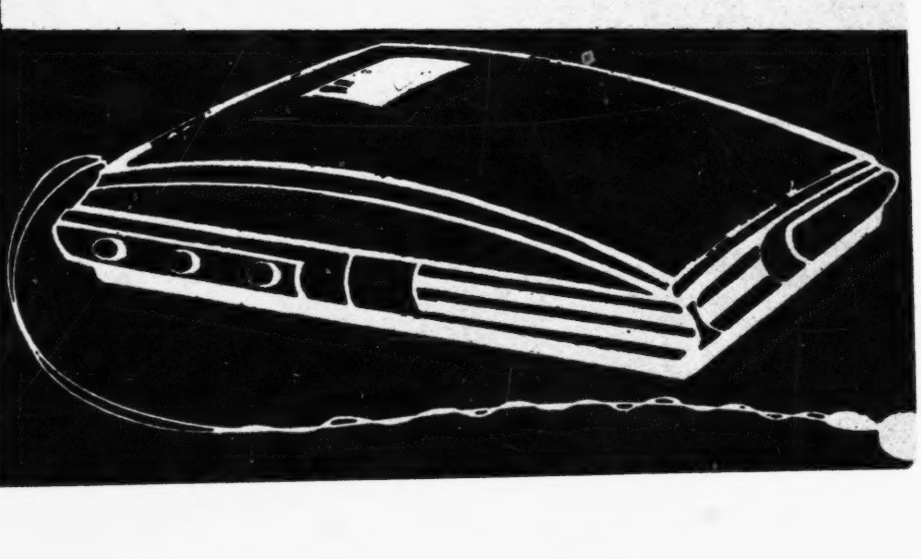

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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OE-86011

STENOGRAPHIC, SECRETARIAL, AND RELATED OCCUPATIONS

A Suggested Curricula Guide

U.S. DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE
Office of Education ● Division of Vocational and Technical Education

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FOREWORD

This publication was prepared to assist those involved in administering vocational education programs in stenographic, secretarial, and related office occupations. It offers suggestions for courses of study, tests, and teaching materials, and other information helpful in conducting programs under current legislative enactments. The "suggested" curricula should be adapted to meet local conditions and needs.

The Vocational Education Act of 1963 is a landmark in the history of vocational education. The Act authorizes Federal grants to help the States support, expand, and improve their programs, so that all persons will have access to vocational training or retraining opportunities consistent with the Nation's manpower and employment needs.

The Act further assures flexibility in training programs that keeps them up-to-date with the current needs of management and labor. It is also concerned with the quality of training or retraining programs, thus offering a challenge to vocational education administrators and local public educational agencies to provide services assuring high quality programs. These services include teacher-training, supervision, research, vocational counseling and guidance, program evaluation, curricula development, and training programs for persons with special needs.

The 1963 Act is comprehensive and realistic in its concern more with groups of people and their special educational needs for gainful employment as skilled workers or technicians than with occupational categories. Therefore, unlike previous legislation affecting vocational education, this legislation covers all occupations, including education for stenographic, secretarial, and related office occupations.

This guide was prepared by C. E. Leslie & Associates under contractual arrangements between the U.S. Office of Education and McGraw-Hill, Inc. Among those serving as consultants to C. E. Leslie & Associates were specialists from industry; administrators from State level vocational-technical education programs; faculty members of high school, junior college, college, and university business education departments; members of secretarial associations; and publishers' representatives. A wide range of suggestions and approaches to the subject were received and, wherever possible, incorporated into the final document. Since the resulting materials represent many opinions, no approval or endorsement of any institution, agency, or persons should be inferred.

The suggested study units for each area of specialization are intensive, enabling students to meet the job requirements of the occupational field. The study units may be modified and lengthened to include required general education studies for in-school trainees. With minor modifications, the content can be used in Manpower Development and Training Programs.

GRANT VENN
Associate Commissioner for Adult,
Vocational, and Library Programs

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THE COMPLETION of the curricula guide depended upon the assistance and cooperation of many persons. The U.S. Office of Education, Division of Vocational and Technical Education, wishes to acknowledge in particular the contributions of the following professional leaders, members of associations, specialists in the field of office education, and publishers' representatives.

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*Only selected subheadings are cited.

INTRODUCTION

The Vocational Education Act of 1963 and the Manpower Development and Training Act of 1962 (as amended in 1963 and 1965) provide unparalleled opportunities for realistic vocational preparation for virtually all qualified and interested persons who evidence the potential to achieve competence in a particular occupation or occupational field. These legislative acts reflect the concern of the Nation to utilize, and support financially, the vocational education resources of the various States for the benefit of each person and of the Nation itself.

This section presents some pertinent provisions of these laws as they relate to the development of this suggested curricula guide.

OFFICE OCCUPATIONS EDUCATION

The Area Redevelopment Act gave Federal support for office occupations education, in addition to training in other occupations. The scope of the program, the number of people, and the areas involved, however, were modest by comparison to those affected by subsequent legislation. The Manpower Development and Training Act of 1962 (M.D.T.A.) provided Federal funds to the States for the vocational and on-the-job training of unemployed and underemployed persons. This provided them with new skills, refreshed old skills fallen into disuse, upgraded skills for job and economic advancement of the individual, and provided basic education (as needed).

Among the most popular programs offered under the M.D.T.A. were those for training in office occupations. In fact, three of the top ten positions were in office occupations. Two U.S. Office of Education suggested curricula guides, *OE–86006-Clerical and Record Keeping Occupations* and *OE–86007-Stenographic and Secretarial Occupations,* were developed under the M.D.T.A. for use by teachers and local and State school administrators. These guides were job-oriented in accordance with the requirements for these occupations included in the *Dictionary of Occupational Titles* and other sources. The generalized nature of the job descriptions, or definitions, resulted in a clustering of skills and duties presented in those guides. There was, however, no definition of specialization studies required, except for supervisory positions.

Another suggested curricula guide, also developed by the U.S. Office of Education under the M.D.T.A., was *OE–86010-Electronic Business Data Processing Peripheral Equipment Occupations.* This guide considered the areas of study, training, and practice needed for specialization in some of the jobs associated with business data processing. In addition, this guide included job descriptions from the *Dictionary of Occupational Titles,* detailed occupational and course of study prerequisites, and, similar to the previously mentioned guides, standards of achievement or the objectives to be attained in each study unit.

Training programs are still being offered, expanded, and implemented in the States for persons qualifying for support and education under the provision of the M.D.T.A. A 1965 amendment of the M.D.T.A. provides refresher and reorientation education of unemployed professional persons.

The continuation of the M.D.T.A. stenographic and secretarial occupations programs was considered during the initial stages of development of this guide, which, in effect, supersedes OE–86007. With only minor modification, it can be used effectively in M.D.T.A. programs.

The need for vocational education in office occupations was recognized in the Vocational Education Act of 1963, which states in part, ". . . in recognized occupations (including any program designed to fit individuals for gainful employment in business and office occupations) . . ." This Act puts greater emphasis on office occupations training than did the M.D.T.A., by providing this type of training for students in secondary schools as well as for other individuals. The Act further states that the vocational education programs are to include guidance and counseling in connection with the vocational training. This feature serves to assure several purposes: (1) selecting trainees who can reasonably profit from the training by evidencing the necessary aptitudes, attitudes, and capacities; (2) helping the eligible trainee to state a "career objective" first; and (3) providing means to ascertain the expectancy of employment meeting career objectives, within specific localities.

PROVISIONS OF THE VOCATIONAL EDUCATION ACT OF 1963

Section 1 of the Act declares its purpose and reads as follows:

> Section 1. It is the purpose of this part to authorize Federal grants to States to assist them to maintain, extend, and improve existing programs of vocational education, to develop new programs of vocational education, and to provide part-time employment for youths who need the earnings from such employment to continue their vocational training on a full-time basis, so that persons of all ages in all communities of the State—those in high school, those who have completed or discontinued their formal education and are preparing to enter the labor market, those who have already entered the labor market but need to upgrade their skills or learn new ones, and those with special educational handicaps—will have ready access to vocational training or retraining which is of high quality, which is realistic in the light of actual or anticipated opportunities for gainful employment, and which is suited to their needs, interests, and ability to benefit from such training.

A portion of Section 4 (a) of the Act defines the eligible training population and reads:

> Section 4. (a) Except as otherwise provided in subsection (b), a State's allotment under Section 3 may be used, in accordance with its approved State plan, for any or all of the following purposes:
>
> (1) Vocational education for persons attending high school;
>
> (2) Vocational education for persons who have completed or left high school and who are available for full-time study in preparation for entering the labor market;
>
> (3) Vocational education for persons (other than persons who are receiving training allowances under the Manpower Development and Training Act of 1962 (Public Law 87–415), the Area Redevelopment Act (Public Law 87–27), or the Trade Expansion Act of 1962 (Public Law 87–794) who have already entered the labor market and who need training or retraining to achieve stability or advancement in employment;
>
> (4) Vocational education for persons who have academic, socio-economic, or other handicaps that prevent them from succeeding in the regular vocational education program;
>
> (5) Construction of area vocational education school facilities;
>
> (6) Ancillary services and activities to assure quality in all vocational education programs, such as teacher training and supervision, program evaluation, special demonstration and experimental programs, development of instructional materials, and State administration and leadership, including periodic evaluation of State and local vocational education programs and services in light of information regarding current and projected manpower needs and job opportunities.

Section 8 of the Act excludes ". . . any program to fit individuals for employment in occupations which the Commissioner determines, and specifies in regulations, to be generally considered professional or as requiring a baccalaureate or higher degree . . ."

Some of the regulations referenced in Section 8 of the Act have been reprinted from the Federal Register, August 28, 1964, and are titled, Part 104—Administration of Vocational Education, Federal Allotments to States, Rules and Regulations.

Selected abstracted sections of these Rules are not to be construed as legal in any sense, but are presented here to assist users of this guide. For accuracy and completeness of the regulations, the reader is referred to the Federal Register reprint.

SELECTED ABSTRACTS—PART 104—ADMINISTRATION OF VOCATIONAL EDUCATION, FEDERAL ALLOTMENTS TO STATES, RULES AND REGULATIONS

Section 104.1 (c) defines business and office occupations as "... occupations pursued by individuals in public or private enterprises or organizations which are related to the *facilitating function of the office* ..."

Section 104.1 (1) defines an occupational field as a "... group of recognized occupations having substantial similarities common to all occupations in the group ..."

Section 104.6 (a) (2) (iii). specifies that vocational education by the State which qualifies for Federal funds shall be suited to the needs, abilities, and interests of the students.

Section 104.7 (a) states that the employment offices will make occupational information regarding reasonable present and future prospects of employment in the community and elsewhere available to the State board and local educational agencies. Reciprocally, Section 104.7 (b) reads: "Guidance and counseling personnel of the State board and local educational agencies working through the cooperative arrangement will make available to the public employment offices information regarding the occupational qualifications of persons having completed or completing vocational education courses in schools. The State plan shall provide how such information will be considered in the occupational guidance and placement of such persons." Both of these regulations have been used in developing the section in this guide titled, *Selection, Guidance, and Counseling,* in the prerequisites for each occupation, in the Standards of Achievement, and in the Record of Completion.

Section 104.13 (a) (2) (iii) (c) states that the State board or local educational agency responsible for vocational education shall have full charge of determining content and organization of courses and curricula. It follows that all outlines, curricula, teacher and trainee materials, and program plans in this guide are to be considered as only suggestions.

Section 104.13 (b) (1) provides for fitting individuals for employment in a recognized occupation. The training specified may be for entry into an occupation or for upgrading skills to achieve stability or advancement in employment. In this guide, program plans have been designed for continuous study by the trainee beyond initial entry requirements. At the same time, trainees who desire to upgrade skills can be "slotted" or be admitted to study any subject unit for which they meet the prerequisites by exhibiting either equivalent education or proficiency as stated in the Standards of Achievement of the prerequisite unit (s). The course of study for an upgrading trainee can be tailored by the school counselor or administrator to meet the individual needs.

Section 104.13 (b) (2) states that all trainees or students will have an occupational objective or career objective, which is a matter of record. The objective may be a specific occupation or a cluster of closely related occupations.

Section 104.13 (c) (2) (i), dealing with orientation of instruction, states that such instruction shall include classroom instruction and field, shop, laboratory, cooperative work, or other occupational experience. Subsection (ii) provides for the correction by instruction of whatever educational deficiencies the trainee may have that prevent him from profiting from such instruction. The scope of this guide is such that remedial education (with the exception of speech correction) is not included, but is left to the discretion of school administrators to determine and to include in the school's programs.

Section 104.13 (d) (1) indicates that a State plan for vocational instruction may be supplemented by such other general education subjects as may be necessary to develop a well-rounded individual. However, Section 104.13 (h) (4) says that the program of instruction is to be sufficiently extensive in duration and intensive, within a scheduled unit of time, to enable the trainee to develop employable competencies. Thus, the suggested subject units in this guide vary in length of time of study, and the schedules or programs are designed to allow inclusion of general education subjects which may be required by the State.

Section 104.17 deals with business and office occupations and provides for both subject matter and practical experience to be included in the vocational instruction. The *Relevant Work Experience* section of this guide suggests some work experience projects that should be adjunctive to the curricula.

Section 104.18 details the extent of vocational guidance and counseling services. Suggestions regarding the provisions of Section 104.18 will be found in the *Selection, Guidance, and Counseling* section.

For further information regarding rules and regulations, the reader is referred to the Vocational Education Act of 1963 and to the individual State plans.

MANPOWER DEVELOPMENT AND TRAINING ACT

This act was designed primarily for entry, refresher, and upgrading training, with certain subsistence and travel allowances for eligible trainees. Although trainees in M.D.T.A. programs are excluded in Section 4 (a) (3) of the Vocational Education Act of 1963, much of the curricular content in this guide can be used for training persons eligible under the M.D.T.A.

The concern of the Nation for persons to be trained vocationally and to continue in school has also been expressed in other legislation. Some examples are an amendment to Social Security, the Elementary and Secondary School Act, and amendments to the George-Barden and Smith-Hughes Acts. The Social Security Amendment, for example, provides that a person over age 18, who received Social Security benefits until age 18, can receive further benefits until age 22 provided he is a full-time student. Full-time student means a person enrolled in a normal day program, or an evening student in a course of study which will take at least 3 months and who carries a subject load sufficient to complete the course in the time normally required by a day student. Although certain persons specified in the amendment are excepted from benefits, nevertheless, it makes vocational training possible for many persons who otherwise would have had to forfeit the opportunity because of the lack of funds.

HOW TO USE THE GUIDE

This suggested curricula guide may be used to suit a variety of vocational education needs and conditions. It incorporates unitized subject studies and suggested patterns for continuous education to meet specific career objectives of trainees eligible under both the Vocational Education Act of 1963 and the Manpower Development and Training Act of 1962, as amended.

The development of this suggested curricula guide was based on the job definitions or descriptions (including worker requirements) found in the 1965 edition of the *Dictionary of Occupational Titles,* as amended or amplified by information from professional contributors. Teachers, counselors, school administrators, and members of community vocational education committees should become acquainted with the job descriptions, worker trait requirements, and occupational prerequisites detailed in the next two sections of this guide. Since local conditions may affect some employment standards set forth in the occupational prerequisites, modifications may be required. The focus of teaching should be to develop trainees to meet the suggested standards of employability. Teachers should alert counselors about trainees who are not progressing adequately. This advice will enable the counselors to help the trainee by recommending greater effort, remedial training or to discuss possible change of the trainee's career objective in sufficient time to prevent unnecessary frustration or loss of time in vocational preparation.

Just as this type of cooperation must exist between teachers and counselors, close cooperation and full communication should exist between teachers, counselors, school administrators, community boards, employers, and employment offices.

For example, if the selection of trainees is wrong, teaching efforts may be unduly increased and facilities may be used inefficiently. Or, if trainees have developed employable skills and work (either full time or for relevant experience development) is not available, skills and knowledges may decline from employability levels and, as a result, individual morale may be lowered. Department chairmen and school administrators should be advised periodically by teachers and counselors of facility and equipment needs, extent of anticipated enrollment, remedial training needs, and levels of achievement being attained within the suggested time allowances. Program offerings should be coordinated with those of other schools or with a specialized area school offering specific courses of study.

SUGGESTED TRAINING

Under each job description, a group of study units is suggested for the development of required proficiencies. In most instances, these units can be considered as "core" education. Thus, depending on what the individual trainee offers as education or experience, units may be deleted from or added to the suggested material. This flexibility should provide for the needs of the training population.

BASIC STENOGRAPHIC-SECRETARIAL PROGRAM (USOE Code 14.0700)

The *Curricula Synopses* section shows typical full-time training programs, predicated on a 6-hour school day, that can be used to develop employable skills and knowledges in minimal time for several entry level occupations, and to provide a foundation for specialized stenographic and secretarial occupations. Because of the variations in trainee qualifications for vocational education, for example, subject units dealing with citizenship education or other studies that may be required by individual States, some alteration of this basic program may be made. It is suggested that the skill units sequence be maintained, wherever possible, since basic skills should be highest when trainees are ready to be employed.

FULL-TIME TRAINING PROGRAMS

Full-time programs, which require no specialized studies, may be offered in high schools, post-secondary, and special schools. A variety of sources for remedial work should be made available for trainees who require remedial training in order to profit from the regular program.

Programs which require elective or specialized studies, such as medical or legal terminology, may originate in the high school and be continued in the post-secondary school where the trainee's specialized skills and knowledges can be developed. Skills covered by the *Specialized Office Education Units* section may be offered in post-secondary schools, area schools, or community, junior, or senior colleges. The studies in the *Administrative Office Education Units* section can be offered in post-secondary schools or community, junior, or senior colleges.

Provision for relevant work experience projects should be made by each local educational agency as indicated in the programs.

PART-TIME TRAINING PROGRAMS

Since the curricula are unitized, special part-time programs can be organized in high schools or post-secondary schools to suit the needs of trainees. Such programs should be sufficiently intensive to meet approved State plan requirements.

REFRESHER AND UPGRADING PROGRAMS FOR ADULTS

As in the part-time programs, the skill and knowledge units can be selected to meet the needs of adults who wish to refresh or upgrade their skills. Careful assessment by counselors should be made of the trainee's claimed proficiencies and experience before suggesting a course of study.

MANPOWER DEVELOPMENT AND TRAINING PROGRAMS

The suggested full-time programs can be used for trainees qualifying under the Manpower Development and Training Act. Because the Act provides for refresher and upgrading training, the programs can be tailored to meet a variety of trainee needs as previously stated.

SUGGESTED STANDARDS OF ACHIEVEMENT AND RECORD OF COMPLETION

Each unit has suggested achievement standards. These standards are expressed in several ways, depending on the nature of the studies. Some standards, usually those dealing with basic skills, are quantitative; others are in terms of the knowledge to have been acquired—in qualitative terms regarding attitudes, interest, and other performance criteria not easily measured objectively. Collectively, the suggested standards for each unit of study in the program should equal or exceed the employability standards stated in the occupational prerequisites.

One unifying element suggested for the various uses to which the guide may be put is the Record of Completion. This record has several purposes:

1. It safeguards the school (s) against possible misrepresentation or error by an applicant seeking a position in the occupational field, as regards completion of a course of study.
2. It serves as a reward to motivate a student to complete a course of study successfully.
3. It can be used as a transcript for school transfer purposes for future enrollment for specialization by a trainee.
4. It can be used as a base from which counselors or teachers in the same or different schools can prepare specific programs of study for the trainee.
5. It can result in a saving of time or investigation by an employment office.

6. It can be used in lieu of grades to standardize on skill and knowledge achievements, thus saving possible embarrassment of the trainee by an employer or employer's representative. It also provides a basis to evaluate the trainee with other trainees from different groups, rather than solely on his performance as contrasted with trainees in a given local group.
7. It can be used as an objective measurement against certain employment standards.

The record has some shortcomings which should be noted:

1. While providing statements of trainee skill achievement in quantitative terms, it also provides for qualitative statements. These qualitative assessments, however, are usually limited to the knowledge items of study.
2. Many judgments of proficiency are left to the individual teacher. This may result in evaluation differences. When objective tests are used, some of these differences may be reduced.

A trainee who leaves a program, either after having completed his suggested program or earlier, should be given his Record of Completion indicating partial or full completion of appropriate studies. Copies of this record should be kept in the school office.

Trainees, who have been away from training for a period of time which in the judgment of counselors, teachers, and school administrators is sufficiently long to have effected a deterioration of skills, should be reexamined when entering a vocational education program. The prerequisites for unit study usually state completion of prior units of study or demonstration by the trainee of proficiencies equivalent to the standards of achievement for those prior units. Discretion in the evaluation of these equivalent proficiencies should be exercised. The acceptance of trainees for further study should be consistent with school policies under State plans.

It is suggested that the Record of Completion show the detail of the program by skill and knowledge areas and the competencies achieved by the trainee. A folder for each trainee should include evaluations at completion of each unit of study. Interim evaluations for record accuracy should be obtained from teachers. Teachers should incorporate the last quantitative measures of achievement by the trainee, as well as the qualitative judgments required in the unit. One suggested version of a Record of Completion is shown in the section, *Selection, Guidance, and Counseling.*

ABOUT THE DICTIONARY OF OCCUPATIONAL TITLES

The third edition of the *Dictionary of Occupational Titles,* published in 1965, was produced by the United States Employment Service. It contains information about the world of work for use by persons engaged in the fields of manpower utilization, classification, recruitment, and selection. It is also useful for those concerned with vocational counseling, education, and training. Users of this suggested curricula guide who may not have ready access to the *Dictionary of Occupational Titles* (D.O.T.) will find this section helpful in understanding the structure of the new D.O.T. and how information contained therein has been used in the development of the curricula.

Since its original publication in 1939, the D.O.T. has undergone several changes to keep pace with changing job patterns and the needs of those involved in various manpower resource services. The third edition reflects the results of new occupational research and job analysis techniques, pilot studies, and contributions by industry, professional societies, trade organizations, government agencies, and subject-matter specialists. The new D.O.T. supersedes the 1949 edition of Volumes I and II, supplement of March 1955, and D.O.T. part IV issued in 1944.

The major portion of Volume I of the new issue is devoted to the names and definitions of various occupations arranged alphabetically by job titles and their commonly used alternates. Occasionally, inversion or modification of the job title is made in order to group similar jobs and to assist users to locate a definition of a particular job. The job definitions provide or imply information about the content, execution, and purpose of the work; the nature of functions performed; the significant aptitudes, interests, temperaments, knowledges, and abilities required; and the physical demands and working conditions necessitated by the particular type of work. As a consequence, the wording of the job definitions is in broad terms with an attempt to be all-inclusive. Not all definitions, therefore, will coincide exactly with like jobs in particular establishments or localities. A job definition usually receives the designation of the industry in which it is found. However, jobs which are found in several industries are designated by the particular type of activity. The term "clerical", for example, is applied to typists, stenographers, secretaries, adding-machine operators, and the like. Volume I also has information about occupational classification and coding, arrangement, and uses of the Dictionary.

Volume II of the D.O.T. presents the grouping of jobs, "having the same basic occupational, industrial, or worker characteristics to help the user discern relationships among occupations; and, as a standard approach to classifying the abilities, vocational experiences, and potential of workers." The Introduction to Volume II states: "It (the third edition of the D.O.T.) should be more useful to guidance and placement personnel in dealing with persons planning careers or seeking employment." In addition, Volume II contains a Glossary which defines technical terms found in Volume I and two appendices which explain coding relationships and worker trait components.

Pertinent information from Volumes I and II has been abstracted selectively and is presented here in brief.

DICTIONARY OF OCCUPATIONAL TITLES CODING

Each job definition has a code number of six digits. The digits have individual significance for users of the D.O.T. The coding for the job definition of secretary (clerical), alternately titled girl friday and secretarial stenographer, is *201.368* in the D.O.T.

The First Three Digits

The first three digits, 201, refer to the occupational classification by category, division, and the further refined (referred to as such in the D.O.T.) 3-digit group. The first digit refers to an occupational *category,* the second to a *division,* and the third to the subsequent *3-digit group.* There are nine number designated occupational categories as follows:

0⎱ Professional, technical, and managerial occupations
1⎰
2 Clerical and sales occupations
3 Service occupations
4 Farming, fishery, forestry, and related occupations
5 Processing occupations
6 Machine trades occupations
7 Bench work occupations
8 Structural work occupations
9 Miscellaneous occupations

The first digit, 2, places the job in the clerical and sales occupations group. A definition of category 2 as found in the section, "Occupational Group Arrangement of Titles and Codes," of Volume II reads:

> 2 Clerical and Sales Occupations
>
> This category includes occupations concerned with preparing, transcribing, transferring, systematizing, and preserving written communications and records; collecting accounts; distributing information; and influencing customers in favor of a commodity or service. Includes occupations closely identified with sales transactions even though they do not involve actual participation.

The next digit, 0, refers to a particular division within category 2. The title and definition of this division is:

> 20 Stenography, Typing, Filing, and Related Occupations
>
> This division includes occupations concerned with making, classifying, and filing records, including written communications.

The third digit, 1, refers to a three-digit group definition which is:

> 201 Secretaries
>
> This group includes occupations concerned with carrying out minor administrative and general office duties in addition to taking and transcribing dictation. Occupations concerned primarily with taking and transcribing dictation are included in Group 202.

The secretarial occupations listed in the D.O.T. with these first three digits (201) are shown below. The letters in parentheses in the column left of the code numbers do not appear in the D.O.T., but are used for reference and will be explained in this subsection.

(a) 201.268 Social Secretary (clerical)
(a) 201.368 Secretary (clerical)
(b) girl friday
(b) secretarial stenographer
(c) Legal Secretary (clerical)
(c) Medical Secretary (clerical)

The stenographer grouping as it appears in the D.O.T. is given below with coding. Again, letters in parentheses to the left of the code number column do not appear in the D.O.T. and are used for reference only .

(a) 202.388 Court Reporter (clerical)
(b) law reporter
(a) Stenographer (clerical)
(b) clerk-stenographer
(d) Foreign - Language Stenographer (clerical)
(d) Legal Stenographer (clerical)
(d) Medical Stenographer (clerical)
(d) Police Stenographer (gov. ser.)
(d) Public Stenographer (clerical)
(d) Technical Stenographer (clerical)
(c) Stenographer, Print Shop (print. & pub.)
(a) Stenotype Operator (clerical)
(b) stenotype-machine operator
(b) steno-typist

The letters in parentheses indicate the types of titles, the manner of their listing, whether or not job definitions will be found for these titles in the D.O.T., and the way in which they appear in the "Occupational Group Arrangement of Titles and Codes" section of the D.O.T. All titles designated (a) are in capital letters and are classed as *base titles.* Titles with designation (c), and in capital letters, are classed as *defined related titles.* The letter (b) designates *alternate titles.* Titles indented and bearing initial capitals are designated (d) and are called *undefined related titles* in the D.O.T. *Base titles* and *defined related titles* are defined in the D.O.T. *Defined related titles* bear the same code number as the *base title* and their definitions are found in Volume I indented under the base title definition. *Alternate titles* appear in lower case letters and are alternates or synonyms for the title preceding them and are not defined separately. *Undefined related titles* are contained in the body of the definition of the title under which they appear, and they are specializations of the more general duties as described in the definition.

The Last Three Digits

The three digits to the right of the decimal point (places 4, 5 and 6) refer to coding which indicates the job's relationship to Data, People, and Things, respectively. They identify the highest appropriate *function* in each hierarchy required by the job and when taken together indicate collectively the total level of complexity at which the worker must perform. The following table, taken from the D.O.T., presents the three groupings arranged in descending order of complexity, that is, the higher the digit, the less complex the function. Under People, the D.O.T. cautions that the relationships can only be considered in the most general sense, since the arrangement is somewhat arbitrary and each relationship represents a wide range of complexity.

Data in the D.O.T. is defined as: Information, knowledge, and conceptions, related to data, people, or things, obtained by observation, investigation, interpretation, visualization, mental creation; incapable of being touched. Written data take the form of numbers, words, symbols; other data are ideas, concepts, and oral verbalization. Of significance to users of this guide are the definitions of 1, 2, and 3 under Data. 1. *Coordinating* is defined as: Determining time, place, and sequence of operations or actions to be taken on the basis of analysis of data. Executing determinations and/or reporting on events. 2. *Analyzing* is defined as: Examining and evaluating data. Presenting alternative actions in relation to the evaluation is frequently involved. 3. *Compiling* is defined as: Gathering, collating, or classifying information about things, data, or people. Reporting and/or carrying out a prescribed action in relation to the information is frequently involved.

Data (4th digit)		*People (5th digit)*		*Things (6th digit)*	
0	Synthesizing	0	Mentoring	0	Setting-Up
1	Coordinating	1	Negotiating	1	Precision Working
2	Analyzing	2	Instructing	2	Operating-Controlling
3	Compiling	3	Supervising	3	Driving-Operating
4	Computing	4	Diverting	4	Manipulating
5	Copying	5	Persuading	5	Tending
6	Comparing	6	Speaking-Signaling	6	Feeding-Offbearing
7 8	No significant relationship	7	Serving	7	Handling
		8	No significant relationship	8	No significant relationship

NOTE: The numeral 7 in the Data hierarchy is used when the worker's involvement in the Things hierarchy is at the 0, 1 or 2 level and there is no significant relationship to Data or People.

The definitions of the functions under People, as they appear in the D.O.T., are presented below:

0. *Mentoring:* Dealing with individuals in terms of their total personality in order to advise, counsel, and/or guide them with regard to problems that may be resolved by legal, scientific, clinical, spiritual, and/or other professional principals.

1. *Negotiating:* Exchanging ideas, information, and opinions with others to formulate policies and programs and/or arrive jointly at decisions, conclusions, or solutions.

2. *Instructing:* Teaching subject matter to others, or training others (including animals) through explanation, demonstration, and supervised practice; or making recommendations on the basis of technical disciplines.

3. *Supervising:* Determining or interpreting work procedures for a group of workers, assigning specific duties to them, maintaining harmonious relations with them, and promoting efficiency.

4. *Diverting:* Amusing others.

5. *Persuading:* Influencing others in favor of a product, service, or point of view.

6. *Speaking-Signaling:* Talking with and/or signaling people to convey or exchange information. Includes giving assignments and/or directions to helpers or assistants.

7. *Serving:* Attending to the needs or requests of people or animals or the expressed or implicit wishes of people. Immediate response is involved.

Although the jobs covered in the curricula are given the numeral 8 designation for the Things hierarchy, it may be of interest to some users to know the definitions given for Operating-Controlling and Manipulating. These are shown below.

2. *Operating-Controlling:* Starting, stopping, controlling, and adjusting the progress of machines or equipment designed to fabricate and/or process objects or materials. Operating machines involves setting up the machine and adjusting the machine or material as the work progresses. Controlling equipment involves observing gages, dials, etc., and turning valves and other devices to control such factors as temperature, pressure, flow of liquids, speed of pumps, and reactions of materials. Setup involves several variables and adjustment is more frequent than in tending.

4. *Manipulating:* Using body members, tools, or special devices to work, move, guide, or place objects or materials. Involves some latitude for judgment with regard to precision attained and selecting appropriate tool, object, or material, although this is readily manifest.

Referring back to the six-digit number given for secretary which was 201.368, the last three digits can now be interpreted as to the types of demands made of the worker to carry out the job's relationships with respect to Data, People, and Things. Most jobs classed in secretarial and related work have as their last three digits either .268 or .368 while those in stenographic and related work are designated .388.

The D.O.T. uses the last three digits to classify jobs into worker trait groups. Since there is little or no variation in the last three digits, it would appear that there is a high correlation between relationships to Data, People, and Things and the specific worker trait requirements that characterize a group.

Worker Traits

Each worker trait group is defined by presenting narrative information that describes the work performed, identifies significant worker requirements, suggests possible clues that may be useful in relating applicants for employment and the requirements, and gives a general picture of typical training and methods of entry pertinent to the jobs listed in the group.

In addition to the narrative information, the display of the worker trait grouping shows related classifications of work and a qualifications profile. These displays are found in the section titled "Worker Traits Arrangement of Titles and Codes." The details necessary to explain the qualifications profile are found in "Appendix B—Explanation of Worker Trait Components" of Volume II. The worker trait components are training time, both general educational development (GED) and specific vocational preparation (SVP); aptitudes (Apt.); interests (Int.); temperaments (Temp.); and physical demands or capacities (Phys. Dem. or Cap.).

Two typical displays of interest to users of this guide are exhibited on pages 12 and 13.

Symbols and Digits in the Qualifications Profile. The following is a brief explanation of the coding used in the qualifications profiles:

GED—General Educational Development. The GED for the secretarial and related work qualifications profile is specified at level 4. This number does not refer to a school grade, but rather to the stage of *reasoning, mathematical,* and *language* use development required to do the job. This level calls for the application of rational systems, such as bookkeeping, to problems and to the interpretation of instructions; the use of ordinary arithmetic, algebraic, and geometric procedures in standard applications; and the ability to transcribe dictation, make appointments, handle mail, interview and screen visitors, and write routine correspondence.

For the stenographic and related work qualifications profile, the GED is specified at level 3. This level means the application of common sense to carry out oral or written instructions; to deal with problems involving several concrete variables in standard situations; to make arithmetic calculations involving fractions, decimals, and percentages; to file, post, and mail materials such as forms, checks, receipts, and bills; to copy data from one record to another; to fill in report forms; and to copy-type from rough draft or corrected copy.

SVP—Specific vocational training. SVP indicates the training received under a variety of circumstances and is expressed in units of time. The number 6 indicates vocational training of more than one year, up to and including two years; number

Exhibit

SECRETARIAL AND RELATED WORK

.268; .368

Work Performed

Work activities in this group primarily involve performing such clerical tasks as taking dictation and typing, and assuming minor executive duties which relieve organizational officials from these responsibilities. The basic duties are taking dictation either by hand or shorthand machine and transcribing by typewriter from these notes or from a recording played on a transcribing machine. Other duties include making and reminding executives of appointments, interviewing and screening office visitors, answering and making telephone calls, and reading and writing routine correspondence.

Worker Requirements

An occupationally significant combination of: Facility with words; the ability to successfully perform work of a detailed nature and avoid errors; diplomacy and tact in dealing with people; an interest in meeting different kinds of people and the ability to adapt to fluctuating situations; form perception to perceive differences in shorthand symbols; and motor coordination and finger dexterity for some office machines.

Clues for Relating Applicants and Requirements

Success in high school commercial course.
Poise, good grooming, and tasteful manner of dressing exhibited in interview.
Pleasant personality and speaking voice.
Part-time work experience as receptionist.
Expressed preference for public contact work.

Training and Methods of Entry

A broad educational background is of considerable value to a person who wishes to gain entry. Completion of a business course in high school or commercial college, demonstrated ability in office skills, and such personal qualifications as conscientiousness, discretion, and a pleasant personality are most important. Additional education in night schools and college work in secretarial studies is very often required for most responsible positions. Some employers require a knowledge of the terminology of a particular field, such as medicine, law, or engineering.

Workers frequently start with basic typing or stenographic positions and advance to secretarial jobs when they have acquired the necessary background and training. Some schools conduct cooperative work-study programs through which students gain job experience before graduation.

RELATED CLASSIFICATIONS

Stenographic and Related Work (.388) p. 278
Typing and Related Recording (.588) p. 287
Corresponding and Related Work (.288; .388) p. 256
Information Gathering, Dispensing, Verifying, and Related Work (.368) p. 258
Interviewing, Information-Giving, and Related Work (Vocational, Educational, and Related Activities) (.168; .268) p. 250

QUALIFICATIONS PROFILE

GED: 4
SVP: 6

Apt:	**GVN**	**SPQ**	**KFM**	EC
	223	422	233	54 5

Int: 2 6
Temp: 1 5 9
Phys. Dem: S 4 5 6

20	STENOGRAPHY, TYPING, FILING, AND RELATED WORK
201.	Secretarial Work
201.268	Social Secretary (clerical)
201.368	Secretary (clerical) Legal Secretary (clerical) Medical Secretary (clerical)

96	AMUSEMENT, RECREATION AND MOTION PICTURE WORK, N.E.C.
969.	Miscellaneous Amusement, Recreation, and Motion Picture Work, n.e.c.
969.368	Script Clerk (motion pic.)

Exhibit

STENOGRAPHIC AND RELATED WORK

.388

Work Performed

Work activities in this group primarily involve taking shorthand by hand or machine and transcribing it with a typewriter.

Worker Requirements

An occupationally significant combination of: The ability to understand the meaning and relationships of words and sentences; finger dexterity and eye-hand coordination for taking dictation or typing; form perception to recognize shorthand symbols; adaptability to routine, repetitive, and uninvolved tasks; attention to detail in dictation or typed materials to avoid error; willingness to work according to instructions; ability to work with specialized terminology, such as that in the medical, legal, or engineering fields.

Clues for Relating Applicants and Requirements

Completion of typing, shorthand, and other business courses in high school or business school.

Successful performance on clerical aptitude and achievement tests.

Training and Methods of Entry

A majority of workers who enter this field are high school graduates who have received specialized training in typing, shorthand, and business courses in high school or business schools. Passing of typing and shorthand tests usually are required.

RELATED CLASSIFICATIONS

Secretarial and Related Work (.368) p. 263
Typing and Related Recording (.588) p. 287
Classifying, Filing, and Related Work (.388) p. 276
Corresponding and Related Work (.288; .388) p. 256

QUALIFICATIONS PROFILE

GED: 3
SVP: 5 4 6

Apt:	GVN	SPQ	KFM	EC
	324	422	233	55
	23		2	

Int: 3 6
Temp: 3 Y 2
Phys. Dem: L 4 5 6

20	STENOGRAPHY, TYPING, FILING, AND RELATED WORK
202.	Stenography
202.388	Court Reporter (clerical)
	Stenographer (clerical)
	Stenographer, Print Shop (print. & pub.)
	Stenotype Operator (clerical)

5 specifies training time of more than six months, up to and including one year; number 4 is stated as a training time over three months, up to and including six months. In the stenographic qualifications profile, the use of codes 5, 4, and 6 indicates that some of the occupations in this grouping require more training than others.

Apt—Aptitudes. The letters used to specify aptitudes are defined as follows:

G—Intelligence or general learning ability.

V—Ability to use and understand meanings and relationships of words and verbally expressed ideas.

N—Ability to perform arithmetical operations quickly and accurately.

S—Ability to comprehend forms in space and to visualize objects and geometric forms.

P—Ability to perceive pertinent details in objects or pictorial representations.

Q—Ability to perceive pertinent details in verbal or tabular materials, to observe differences in copy, to proofread words and numbers, and to avoid perceptual errors in arithmetic computations.

K—Ability to coordinate eyes and hands or fingers when making precise, rapid movements.

F—Finger dexterity.

M—Ability to use hands skillfully.

E—Eye-hand-foot coordination.

C—Ability to recognize color values such as contrast and harmony and the ability to match colors.

In the secretarial and stenographic profiles, certain aptitude symbols appear in boldface type. These aptitudes are G, V, P, Q, K, and F, and they are considered to be the significant aptitudes required for *average* successful job performance. The digits below the aptitude symbols indicate the degree of aptitude required, expressed in terms of equivalent averages found in segments of the general working population. The following scale is used:

1—The top 10 percent of the population: This segment possesses an extremely high degree of the aptitude.

2—The highest third, exclusive of the top 10 percent, of the population: This segment possesses an above average or high degree of the aptitude.

3—The middle third of the population: This segment possesses a medium degree of the aptitude, ranging from slightly below to slightly above average.

4—The lowest third, exclusive of the bottom 10 percent, of the population: This segment possesses a below average or low degree of aptitude.

5—The lowest 10 percent of the population: This segment possesses a negligible degree of the aptitude.

Int—Significant interests. The significant interests in the exhibited profiles are 2, 3, and 6. These are defined as:

2—Situations involving a preference for activities concerning business contact with people.

3—Situations involving a preference for activities of a routine, concrete, organized nature.

6—Situations involving a preference for activities concerned with people and the communication of ideas.

Temp—Temperatments. In the exhibited profiles, temperaments are given by the symbols 1, 2, 3, 5, 9, and Y. These occupational situations to which the worker must adjust are defined as follows:

1—Situations involving a variety of duties often characterized by frequent change.

2—Situations involving repetitive or short cycle operations carried out according to set procedures or sequences.

3—Situations involving doing things only under specific instructions; little or no room for independent action or judgment in working out job problems.

5—Situations involving the necessity of dealing with people in actual job duties, beyond giving and receiving instructions.

9—Situations involving the evaluation (arriving at generalizations, judgments, or decisions) of information against sensory or judgmental criteria.

Y—Situations involving the precise attainment of set limits, tolerances, or standards.

Phys. Dem. or Cap.—Physical demands or capacities. The physical demands or capacities symbols in the exhibited profiles are L, S, 4, 5, and 6. These are defined as:

L—Light Work: Lifting 20 pounds maximum, with frequent lifting and/or carrying of objects up to 10 pounds. Even though the actual weight lifted may be only negligible, a job is considered to be in this category when it requires walking or standing to a significant degree, or when it involves sitting most of the time with a degree of pushing and pulling of arm and/or leg controls.

S—Sedentary Work: Lifting 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, ledgers, or small tools. Although a sedentary job is defined as one which involves sitting, a certain amount of walking and standing is often necessary to carry out job duties. Jobs are sedentary if walking and standing are required only occassionally and other sedentary criteria are met.

4—Reaching, Handling, Fingering, and/or Feeling:
  (1) Reaching—Extending the hands and arms in any direction.
  (2) Handling—Seizing, holding, grasping, turning, or otherwise working with the hand(s). (Fingering is not involved.)
  (3) Fingering—Picking, pinching, or otherwise working with the fingers primarily, rather than with the whole hand or arm as in handling.
  (4) Feeling—Perceiving such attributes of objects and materials as size, shape, temperature, or texture, by means of receptors in the skin, particularly those of the fingertips.

5—Talking and/or Hearing:
  (1) Talking—Expressing or exchanging ideas by means of the spoken word.
  (2) Hearing—Perceiving the nature of sounds by ear.

6—Seeing: Obtaining impressions through the eyes of the shape, size, distance, motion, color, or other characteristics of objects. The major visual functions are:
  (1) Acuity, far—Clarity of vision at 20 feet or more.
  Acuity, near—Clarity of vision at 20 inches or less.
  (2) Depth perception (three-dimensional vision)—The ability to judge distances and space relationships so as to see objects where and as they really are.
  (3) Field of vision—The area that can be seen up and down or to the right or left while the eyes are fixed on a given point.
  (4) Accommodation—The adjustment of the lens of the eye to bring an object into sharp focus. This item is especially important when doing near-point work at varying distances from the eye.
  (5) Color vision—The ability to identify and distinguish colors.

Related Classifications. The related classifications section of the worker trait group display identifies other worker trait groups that have something in common with the group examined and also serves as a reference to the D.O.T. user. A careful examination of these related classifications will reveal which characteristics, skills, and functions are common to all.

Additional Comments About the D.O.T.

The D.O.T. serves as a useful springboard for the occupational activities analysis necessary to the development of curricula. When information contained in the worker trait group display, including the qualifications profile, is examined, a generalized pattern emerges for the particular job under consideration. This is probably a result of the blending of the all-inclusive terminology employed by the D.O.T.

A more accurate delineation of skills, functions, duties, and responsibilities required by each job in this guide, in terms of employability standards to be achieved and training content, became necessary to bring particular jobs into proper focus. It was decided to obtain a consensus of observations, descriptions, and prerequisites of the covered jobs from the contributing specialists and consultants. These consensus job definitions and refined prerequisites are included for each job in the next section of this guide. The job descriptions, in some instances, are enlargements of similar D.O.T. definitions. In other instances, job descriptions are included which have no direct counterparts referenced or defined in the D.O.T. The objective in all instances has been to give guidance, placement, and selection counselors, teachers, and school administrators, at all levels, a more comprehensive view of the jobs covered. This comprehensive approach should enable clearer information to be given to the trainee to help him establish his career objectives.

It is recognized that some teachers, administrators, and counselors may take issue with some of the coding in the Data, Things, and People hierarchies and also with the details of the qualifications profile as set forth in the D.O.T. Amendments to some of the job specifications and indicators will probably appear or will be implied in the occupational prerequisites which appear with the job descriptions in this guide. These amendments should be taken as supplements to the D.O.T., rather than corrections, because of the generalized terms employed by the D.O.T.

There may be varying viewpoints regarding the interests, abilities, aptitudes, and temperaments, and the level of each, required for particular jobs. Workers in any occupation will exhibit a wide range of abilities, temperaments, and interests. Exact matching of these qualities with individuals will pose serious selection, training, and employment problems. Merely because a worker has basic aptitudes which are thought to be directly related to job performance does not insure success either in training or employment. However, failure to exhibit any of the well-correlated aptitudes for the occupation will often result in failure of the individual. Teachers, counselors, and others are referred to the section on guidance in this guide for further information regarding the selection process and testing.

The *Occupational and Training Analyses* section of this guide should also be consulted. This section contains a short analysis of each job's activities in terms of required skills, functional knowledge and duties, and environmental knowledge.

The D.O.T. was used, as much as possible, to determine common elements of skills and functional requirements for each of the pertinent jobs listed in its three-digit occupational grouping. Predicated on these findings a *general* pattern of training was developed for basic skills and some of the functional duties required for each job. It became obvious that the subject units included in the basic training had to be tailored and that specialized units would have to be evaluated carefully to determine their contribution to each particular job. Additional consideration was also given to the purposes that each curriculum was to serve. Information concerning these considerations is set forth in the section *About the Curricula.*

The D.O.T. was also used, in terms of aptitudes, interests, and temperaments defined therein, to establish fundamental occupational prerequisites. Again, these were expanded to include employability standards and suggested training. Skills and knowledges gained from work experience, equivalent to the suggested training, are acceptable in lieu of the training. These knowledges and skills should be assessed carefully by counselors and teachers before enrollment of the trainee in particular courses of study.

JOB DESCRIPTIONS, OCCUPATIONAL PREREQUISITES, AND SUGGESTED TRAINING

This section presents stenographic and secretarial job descriptions, as they appear in the D.O.T. and as amplified for the purposes of this guide. Each job description section has four divisions. The first presents some brief general comments, the second gives the job description, the third presents the prerequisites for the occupation including employment standards for skills, and the fourth shows the suggested preparatory training.

The expanded job descriptions are based on information received from consultants, subject-matter specialists, government agencies, and various associations who participated in the development of this guide. The user of the guide is cautioned to accept the job descriptions as approximate and not definitive. Employers may specify in much greater detail the tasks and duties expected to be performed in a particular position. These details will vary according to the size and composition of the office staff; the nature of work done; the location of the office, agency, or branch; the availability of skills in the labor market; and the individual employer's work philosophy.

The word "may" in the job descriptions signifies that the duty following it may be asked by some employers or may be performed only on occasion. In any event, the duty following the word "may" will be subordinate to other duties in the job with respect to the time and effort given to it by the worker.

The occupational prerequisites are a combination of information from the D.O.T. and generally used employment standards expressed in quantitative and qualitative terms. The qualitative aspects of job requirements, in terms of the degree to which the particular ability or characteristic is exhibited, will vary with individual employers in the importance in which they are held and in the way in which they are judged. It is suggested that teachers be especially alert to these aspects and evaluate trainees using criteria for the characteristics similar to those used by employers.

The suggested training data refer to the basic program and the specialized units suggested for study by the trainee to achieve vocational competencies. The guide user should refer to the programs suggested for the job in the *Curricula Synopses* section for a typical arrangement of courses.

DEFINITIONS FROM THE D.O.T.

The following job definitions for stenographic, secretarial, and related occupations appear in the D.O.T.

STENOGRAPHER (Clerical) *202.388,* clerk-stenographer. Takes dictation in shorthand of correspondence, reports, and other matter, and transcribes dictated material, using typewriter. Performs variety of clerical duties (Clerk, General Office), except when working in stenographic pool. May transcribe material from sound recordings (Transcribing-Machine Operator). May perform stenographic duties in professional office and be designated as Legal Stenographer; Medical Stenographer; Technical Stenographer. May take dictation in foreign language and be known as Foreign-Language Stenographer. May be designated according to department in which employed as Police Stenographer (gov. ser.). May work for public stenographic service and be designated Public Stenographer.

STENOGRAPHER, PRINT SHOP (print. & pub.). Takes dictation and transcribes dictated material, and types copy to be printed, using typewriter: Takes dictation. Types manuscript in English or foreign languages. Proofreads typed material. Types directly on metal printing plates used in multilith machine, using electromagnetic typewriter. May use justifying typewriter to produce uniform margins on sides of typed matter. May cut stencils for mimeographing machine, using typewriter.

STENOGRAPHER, PRINT SHOP (print. & pub.) see under Stenographer (clerical).

STENOTYPE-MACHINE OPERATOR (clerical) see Stenotype Operator.

STENOTYPE OPERATOR (clerical) *202.388*, stenotype-machine operator; steno-typist. Takes dictation of correspondence, reports, and other matter on machine that writes contractions or symbols for full words on paper roll. Transcribes stenotype notes on typewriter or dictates notes into recording machine for typist to transcribe.

STENO-TYPIST (clerical) see Stenotype Operator.

COURT REPORTER (clerical) *202.388*, law reporter. Records examination, testimony, judicial opinions, judge's charge to jury, judgment or sentence of court, or other proceedings in court of law by manual or machine shorthand. Reads portions of transcript during trial on judge's request, and asks speakers to clarify inaudible statements. Transcribes recorded material, using typewriter, or dictates material into recording machine.

STENO-POOL SUPERVISOR (clerical) *209.138*. Supervises and coordinates activities of stenographers and typists: Assigns stenographers to executive and department heads to take dictation and transcribe correspondence and memos. Assigns dictaphone records to typists for transcription. Checks stenographers' and typists' copy for neatness, spelling, and punctuation. Assigns other typing work to typists. Performs other duties as described under Supervisor.

SUPERVISOR (any ind.) see Foreman.—(clerical) chief; group leader; head; leader; principal; section chief; senior. Supervises and coordinates activities of group of workers engaged chiefly in one type of clerical function as bookkeeping, typing, and filing: Determines work procedures. Issues written and oral orders or instructions. Assigns duties to workers and examines work for exactness and neatness. Prepares composited reports from individual reports of subordinates. Maintains harmony among workers. Adjusts errors and complaints. May perform essentially same duties as other workers, or assist subordinates in performing duties. May keep time reports and other personnel records. May employ, train, and discharge workers. Classifications are made according to type of work supervised as SUPERVISOR, COMPUTER OPERATIONS; SUPERVISOR, MESSENGERS (tel. & tel.); TELEGRAPHIC-TYPEWRITER OPERATOR, CHIEF.

SECRETARY (clerical) *201.368*, girl friday; secretarial stenographer. Schedules appointments, gives information to callers, takes dictation, and otherwise relieves officials of clerical work and minor administrative and business detail: Reads and routes incoming mail. Locates and attaches appropriate file to correspondence to be answered by employer. Takes dictation in shorthand or on stenotype machine (Stenotype Operator) and transcribes notes on typewriter, or transcribes from voice recordings (Transcribing-Machine Operator). Composes and types routine correspondence. Files correspondence and other records. Answers telephone and gives information to callers or routes call to appropriate official and places out-going calls. Schedules appointments for employer. Greets visitors, ascertains nature of business, and conducts visitors to employer or appropriate person. May not take dictation. May arrange travel schedule and reservations. May compile and type statistical reports. May supervise clerical workers. May keep personnel records (Personnel Clerk). May record minutes of staff meetings.

LEGAL SECRETARY (clerical). Prepares legal papers and correspondence of legal nature, such as summonses, complaints, motions, and subpoenas.

MEDICAL SECRETARY (clerical). Prepares medical charts and reports for doctor or hospital personnel, utilizing knowledge of medical terminology. May prepare and send bills to patients and record appointments.

SOCIAL SECRETARY (clerical) *201.268*. Attends to social, business and personal affairs of employer: Confers with employer on contemplated social functions, sends invitations, and arranges for decorations and entertainment. Advises employer on etiquette, dress, and current events. Reads and answers routine correspondence, making replies on typewriter or in own handwriting as situation demands. May manage financial affairs of entire house.

STENOGRAPHIC JOBS COVERED BY THE GUIDE

The stenographic job descriptions which follow are amplifications of the definitions appearing in the D.O.T. Some of the stenographic jobs described in this section do not appear in the D.O.T. Others are shown with alternately accepted titles (together with descriptions) which are not referred to as *alternate titles* in the D.O.T.

Stenographers (Clerical)–202.388

General

Clerical stenographers working in general business, industry, with professional persons, or in government service are often classified according to their exhibited skills and experience, the extent of assigned responsibility, and the supervision required. Stenographers who specialize in particular fields (law, medicine, science, engineering, or shorthand reporting of courtroom proceedings, conventions, and the like) are shown separately in this section, even though the D.O.T. includes them under the titles, STENOGRAPHER (Clerical) 202.388 and COURT REPORTER 202.388.

In industry, titles usually used for stenographic jobs *not requiring specialization* are:

(1) Stenographer A or I, Beginning or Junior Stenographer, or Clerk-Stenographer GS–3 (or other civil service designation);
(2) Stenographer B or II, Senior Stenographer, or Clerk-Stenographer GS–4;
(3) The classification of Intermediate Stenographer (sometimes designated by letter or number rank in a series) is used also. However, due to the variations in employers' standards, a general description for this position is omitted from consideration here.

STENOGRAPHER A OR I, BEGINNING OR JUNIOR STENOGRAPHER, CLERK-STENOGRAPHER GS–3

Job Description

Takes dictation, in handwritten notes or by shorthand machine, of unspecialized business or professional terminology. Transcribes dictation, from notes or transcribing machine, into final or draft form of memoranda, correspondence, reports, etc., given by supervisors or other personnel to whom assigned. Prepares layouts and types a variety of correspondence, publication manuscripts, reports, and similar material from drafts in which corrections have been noted. Sorts, cross indexes, and files material such as correspondence, memoranda, regulations, or procedures, etc., in subject matter, alphabetical, numerical, or chronological order according to a relatively small number of distinct subject headings. Searches files for supplemental material or uses other sources prescribed by the dictator or defined in standard procedures for the assembly of such material, in addition to stenographic notes, as may be required for preparing manuscript. Prepares spirit, stencil, or other types of reproducible masters. Produces copies, using simple wet and/or dry process duplicating machines. Performs clerical work involving simple computations, postings and statistical reports, including the typing of results. May open and route mail, answer telephone, greet visitors, and perform other minor and sundry clerical duties. Works on own initiative, in accordance with established directions or procedures, on regularly assigned duties, or may perform work under close supervision. All completed work, in final or draft form, is subject to review for neatness, clarity, and accuracy of grammatical construction of words and sentences, and compliance with procedures or regulations.

Prerequisites for the Occupation

Workers in these entry positions should exhibit those characteristics described in the Qualifications Profile and Worker Requirements (except for the last phrase which applies to stenographic work specialties) included in the exhibit, *Stenographic and Related Work, .388.* Employers generally require that this classification of stenographer be able to take dictation at a rate of 80–100 wpm for 5 minutes with 95 percent or better accuracy, to transcribe the dictation accurately at approximately 15–30 wpm, and to type at a rate of 40–50 wpm. (Some variation in these rates may be expected due to vocabulary difficulty level, demand for absolute accuracy of the document, or labor market conditions in the local area.)

Because of the variations in employer expectations and the individual desires of beginning stenographers to assume responsibilities normally assigned to receptionists or secretaries, the stenographer's training must include some secretarial and receptionist training.

Suggested Training

(1) Basic Stenographic-Secretarial Program;
(2) Relevant Work Experience.

STENOGRAPHER B OR II, SENIOR STENOGRAPHER, CLERK-STENOGRAPHER GS–4

Job Description

Takes dictation, in handwritten notes, by shorthand machine (touch shorthand) or by transcribing machine, of difficult and specialized or professional terminology. Transcribes dictation, from notes or transcribing machine, into final or draft form of memoranda, correspondence, reports, special manuscripts, bills, records, vouchers, job orders, agenda, and minutes of meetings. Prepares layout and types a variety of correspondence, publication manuscripts, reports, and other similar material from drafts in which extensive corrections have been made. Sorts, cross indexes, and files material such as correspondence, reports, requisitions, job orders, regulations, or procedures, etc., in subject matter, alphabetical, numerical, chronological, or geographical order according to departmental or company needs. Searches files and uses other sources for the assembly of supplemental material, in addition to stenographic notes, as may be required for the preparation of a variety of copy. Prepares spirit, stencil, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. May prepare replies to general and/or routine correspondence. May serve as alternate receptionist and/or secretary, greet and interview visitors, make appointments, answer telephone, and remind employer of engagements. May requisition sundry office supplies, and repair and duplicating services. May perform other assigned minor clerical duties. May supervise other stenographic or clerical workers. All completed work is subject to review for meeting standards of high accuracy, neatness, and completeness. Works largely under general supervision, and exercises judgment in supervision of other stenographers and in solving problems involving established procedures and policies.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Stenographic and Related Work, .388.* The worker may also be required to demonstrate some of the requirements set forth in the exhibit, *Secretarial and Related Work, .268, .368.* Other abilities generally required by employers are taking dictation at a rate of 100–120 wpm, transcribing at 30–35 wpm, and typing at a rate of 50–60 wpm with errors corrected. (Some variations in these rates may be expected due to vocabulary difficulty level, demand for absolute accuracy of documents, or labor market conditions in the local area.)

Since senior stenographers are often called upon as alternates to a secretary, the senior stenographer's training must include secretarial and receptionist training. The senior stenographer may have to supervise other stenographers and clerical workers and should therefore have training in supervisory fundamentals. Senior stenographers often may progress to Secretary or Steno-pool Supervisor.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Speed Dictation and Transcription (Shorthand IV)	90
(3) Advanced Typing and Production Problems (Typing V)	30
(4) Principles of Effective Supervision	60
(5) Relevant Work Experience: Stenographic Machine Operation II (for machine shorthand stenographers in lieu of 2 and 3)	135

Stenotype Operator (Clerical)–202.388

General

The D.O.T. definition describes this job in terms of the basic skills involved. It differentiates the position from STENOGRAPHER 202.388 only as to the method by which shorthand notes are taken. However, persons possessing basic machine shorthand skills usually are employed in particular classifications such as medical or legal stenographers or secretaries. Some stenotype operators who do not possess additional skills, or who have no desire to employ them, may find work as Note Readers.

NOTE READER

Job Description

This occupation, not defined in the D.O.T., may be full time or part time depending on the volume of work to be done and the worker's willingness to devote time to the job. The position is usually associated with shorthand reporters or secretaries. These persons may turn over machine shorthand notes [for transcription] to Note Readers for transcription to drafts or final copy.

Prerequisites for the Occupation

Proficiency at machine shorthand transcription.

Suggested Training

Intensive study of machine shorthand and typing units to the degree of transcription proficiency desired. The basic stenographic-secretarial program could be helpful.

Legal Stenographer–202.388

General

Employment level gradients found in this occupation range from beginning to senior legal stenographer. Because the senior legal stenographer may perform many secretarial duties, it is often difficult to distinguish between "stenographer" and "secretary" in the legal office. Employers usually differentiate between beginners and senior stenographers on the basis of experience, proficiency, legal office knowledge, maturity, and responsibility assigned. The job description and the occupational prerequisites represent average employer expectations and acceptabilities for this specialized career position from which both beginning and experienced stenographers can advance into legal secretarial positions. The job description below amplifies that shown on the D.O.T.

Job Description

Takes dictation, using manual or machine shorthand, of client and witness interviews with attorney, counsel opinions, special instructions, correspondence, office memoranda, significant court testimony, memorandum notes, public meetings, and legal form data, from a variety of lay and professional persons. Transcribes dictation, from notes or transcribing machine, into final or draft form of information for completion of special legal forms, correspondence and other documents, or manuscripts including legal briefs. Prepares layouts and types from corrected drafts, legal documents, correspondence, and memoranda. Proofreads own work and may proof that of others. Prepares spirit, stencil, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. Keeps books of account, sends out statements of account, receives and may make payments for office and client estates, makes out bank deposit slips, and may perform bank statement reconciliations. Assembles and prepares documents in accordance with direction and procedure. May perform clerical duties such as receiving mail, opening and distributing mail, ordering office supplies, arranging for maintenance of office equipment, handling telegraphic messages and interoffice memoranda, filing legal forms and correspondence, and maintaining docket and tickler files. May perform such secretarial duties as reminding employer of appointments, greeting, screening, and conducting visitors to appropriate person, answering telephone, caring for employer's incidentals, preparing and mailing routine collection letters, assisting in preparing briefs and miscellaneous documents needed at court, obtaining source material, and maintaining the lawyer's library. May work under close or limited supervision depending on experience and/or employer confidence. Work is usually, but not always, subject to close review.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Stenographic and Related Work, .388.* The worker may also be required to demonstrate some of the requirements listed for the legal secretary occupational prerequisites. Other abilities generally required by employers are taking legal terminology dictation at the rate of 100–140 wpm (rate depends on classification as a beginner or senior), typing accurately at 50 wpm or better, and transcribing at a rate of 30–40 wpm with errors corrected. Transcription rate demands will vary because of extreme accuracy required on finished work which usually does not permit erasures (unless skillfully done), and the reference work required of the legal stenographer because of special terminology. Knowledge of legal terminology and forms, general business, the elements of business law and codes, and preparation of routine correspondence are also indicated. Knowledge of courtroom procedures and practice is usually an extra consideration in employment.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Speed Dictation and Transcription (Shorthand IV)	90
(3) Advanced Typing and Production Problems (Typing V)	30
(4) Advanced Speed Dictation and Transcription (Shorthand V)	90
(5) Legal Typewriting	60
(6) Legal Terminology—Dictation and Transcription	60
(7) Legal Office Records and Procedures	60
(8) Business Correspondence	30
(9) Relevant Work Experience:	
Stenographic Machine Operation II (for machine shorthand stenographers in lieu of 2 and 3)	135
Stenographic Machine Operation III (Elective) (for machine shorthand stenographers in lieu of 4)	240

Medical Stenographer—202.388

General

As in other stenographic occupations, workers in this occupation are also classed as beginning or senior medical stenographers on the basis of experience, maturity, assigned responsibility, complexity of work, and supervision required.

The following job description and prerequisites, which encompass both levels in this occupation, are an amplification of the brief job description in the D.O.T.

Job Description

Takes dictation, using manual or machine shorthand, covering varied medical fields and characterized by special medical terminology, from physicians and medical laboratory personnel, of confidential information relating to diagnoses, autopsies, laboratory and clinical procedures and results, medical reports, histories, records, and correspondence. Assists in the preparation of summaries or resumes of medical histories and digests of medical records. May take dictation during the performance of operations, autopsies, or other medical examinations. Transcribes dictation from notes or transcribing machine, into final or draft form of manuscript or special medical forms. Prepares layouts and types various kinds of manuscript copy from corrected drafts. Prepares spirit, stencil, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. Performs a variety of stenographic and clerical duties requiring knowledge of medical procedures, filing practices, and medical office routines. May perform secretarial duties such as making appointments, greeting and routing visitors, preparing routine correspondence for signature, screening telephone calls, opening and routing mail and interoffice memoranda, arranging meetings, keeping sundry records as required by employer, and performing simple bookkeeping tasks. Senior medical stenographers may supervise small groups of other stenographers. Work is usually subject to close review, and supervision may be close (beginning stenographer) or limited (senior medical stenographer).

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Stenographic and Related Work, .388.* The abilities to take medical terminology dictation at a rate of 100–120 wpm, transcribe at a rate of 30–40 wpm, and type at a rate of 50 wpm or better are generally required by employers. (Some variations in these rates may be expected because of vocabulary difficulty level, transcript accuracy demands, consultation of reference materials, and availability of skills in the local labor market.)

Since general clerical and secretarial duties may also be performed, medical stenographic training should include secretarial and receptionist training. Senior medical stenographers should have some supervisory training, since they may be called upon to supervise other stenographic and clerical personnel.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	

	Hours
(2) Speed Dictation and Transcription (Shorthand IV)	90
(3) Advanced Typing and Production Problems (Typing V)	30
(4) Medical Terminology — Dictation and Transcription	210
(5) Hospital Practices, Procedures, and Records	135
(6) Medical Office Practices, Procedures, and Records	140
(7) Relevant Work Experience: Stenographic Machine Operation II (for machine shorthand stenographers in lieu of 2 and 3)	135

Technical Stenographers–202.388

General

The D.O.T. refers to technical stenographer in its general description of stenographer, 202.388. Technical stenographers can be subdivided into the general classifications of beginning and senior stenographers in specialized Scientific Stenographer and Engineering Stenographer classifications. These latter classifications reflect the type of professional by whom technical stenographers are usually employed. Although some of their duties are similar, the stenographic activities differ largely because of the terminology used, and the nature of the organization, and the work performed. The following job descriptions and prerequisites, which encompass both beginning and senior levels in the two specialized fields, are amplifications of the job of technical stenographer which is briefly referenced in the D.O.T.

ENGINEERING STENOGRAPHER

Job Description

Takes dictation, characterized by specialized engineering terminology, symbols, and formulae, using manual or machine shorthand, of information relating to client and interoffice correspondence, bids, proposals, test and engineering reports, manuscripts being prepared for publication, feasibility studies, customer progress reports, minutes of meetings, and verbatim transcripts of project meetings. Transcribes dictation from notes or transcribing machine, into final or draft form of previously referenced documents and information. Prepares layouts and types various kinds of manuscript copy from corrected typed drafts or handwritten notes. Types formulae and symbols, using special keyboard typewriters, onto drawings or in special manuscript sections requiring knowledge of scientific and/or engineering typewriting practice. Prepares manuscripts for submission to professional journals. Prepares stencil, spirit, or other types of reproducible masters, and produces copies using wet and/or dry process duplicating machines. Maintains project distribution and control records of classified data, engineering drawings, records, reports, job control sheets, and other engineering material. May perform a variety of specialized and clerical duties such as: maintaining records of project material forecasts; maintaining small engineering library; searching files for supplementary materials; preparing purchase order requests, material releases, and requisitions; checking material requests and work releases for completeness and authorized signature; keeping minor project cost control; setting up and using files; maintaining personnel data; and performing simple mathematical computations using office adding machines or calculators. May perform minor secretarial duties such as screening telephone calls and receiving visitors. May handle secret and confidential material. Works largely on own initiative following established directions, procedures, or regulations, or may work under close supervision. Work is usually subject to review and verification.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and the Qualifications Profile included in the exhibit, *Stenographic and Related Work, .388.* The abilities to take dictation of engineering terminology at a rate of 100–120 wpm, transcribe at a rate of 30–50 wpm, and type at a rate of 60–65 wpm are generally required by employers. (Some variations in these rates may be expected because of vocabulary difficulty level, transcript accuracy demands, consultation of reference materials or handbooks, and availability of skills in the local labor market.)

Since clerical and secretarial duties may also be performed, some clerical and secretarial training should be included in the engineering stenographer's vocational training program. Although much of the specialized terminology and many of the duties required by an individual engineer or engineering office are usually learned on the job by the engineering stenographer, general knowledge of engineering work or experience in engineering departments may be sought by some employers. The *Specialized Office Education Units* have been designed to meet general engineering terminology and practice needs. Because of the nature of some engineering work, especially that dealing with secret government work and research, some workers may be required to meet security and loyalty standards.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Speed Dictation and Transcription (Shorthand IV)	90
(3) Advanced Typing and Production Problems (Typing V)	30
(4) Scientific Typewriting	60
(5) Science Survey	60
(6) Engineering Terminology—Dictation and Transcription	90
(7) Engineering Office Practices, Procedures, and Records	80
(8) Relevant Work Experience: Stenographic Machine Operation II (for machine shorthand stenographers in lieu of 2 and 3)	135

SCIENTIFIC STENOGRAPHER

Job Description

Takes dictation, characterized by specialized terminology, symbols, and formulae, using manual or machine shorthand, of information relating to correspondence, interoffice memoranda, internal reports, reports prepared for publication in scientific journals, records of experimentation, scientific study and research documents, minutes of meetings, verbatim transcripts of meetings, speeches to be delivered to professional and lay groups, and notes for classroom use. Transcribes dictation from notes or transcribing machine, into final or draft form of previously referenced documents. Prepares layouts and types various kinds of manuscript copy from corrected typed drafts or handwritten notes. Types formulae and symbols, using special keyboard typewriters, onto drawings or in special manuscript sections requiring knowledge of scientific typewriting practice. May type data for computer input. Prepares manuscripts, according to prescribed formats, for submission to professional journals. Prepares stencil, spirit, and other types of reproducible masters. Produces copies using wet and/or dry process duplicating machines. Performs clerical duties such as filing and indexing. May maintain scientific records and information control according to prescribed security regulations. May maintain small scientific libraries, using its reference sources for gathering supplemental materials required for reports. May perform simple arithmetic calculations. May perform certain secretarial duties such as screening telephone calls, greeting visitors, reminding employer of appointments and schedules, processing requisitions and expense accounts, maintaining stationery supplies, and performing other sundry duties as assigned. Works largely on own initiative or may work under close supervision. Work is usually subject to review and verification.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Stenographic and Related Work, .388.* The abilities to take dictation at a rate of 100–120 wpm, transcribe at a rate of 30–50 wpm, and type at a rate of 60–65 wpm or better are generally required by employers. (Some variations in these rates may be expected because of vocabulary difficulty level, transcript accuracy demands, consultation of reference materials, and the availability of skills in the local labor market.) The ability to use special keyboard typewriters with Greek symbols, superscripts and subscripts, and other technical characters is a definite requirement. Familiarity with scientific terminology in general or in a scientific specialty is usually sought by employers.

Clerical and secretarial training should also be provided in the scientific stenographer's vocational training program. Since the trainee may be employed in any of a variety of scientific specialties, some of the training in specialized vocabulary must be learned on the job. Because of the nature of certain scientific work, some workers may be required to meet security and loyalty standards.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Speed Dictation and Transcription (Shorthand IV)	90

	Hours
(3) Advanced Typing and Production Problems (Typing V)	30
(4) Science Survey	60
(5) Scientific Typewriting	60
(6) Organic Chemistry Terminology—Dictation and Transcription	120
(7) Physical Sciences Terminology—Dictation and Transcription	120
(8) Relevant Work Experience: Stenographic Machine Operation II (for machine shorthand stenographers in lieu of 2 and 3)	135

Foreign-Language Stenographer–202.388

General

Foreign-language stenographers are usually well-grounded bilinguals, having acquired knowledge of the foreign language from family or country of national origin. On the other hand, extensive foreign language educational preparation can be obtained in a variety of ways to qualify for employment in this field. Employment opportunities exist in publishing, in import-export companies, in companies having domestic and foreign operations, in government posts, and in schools and universities. The following job description and prerequisites are an amplification of the brief reference in the D.O.T. It is difficult to distinguish between foreign-language stenographers and foreign-language secretaries because of the wide differences in employer needs and expectations.

Job Description

Takes dictation in foreign language, using manual or machine shorthand, of correspondence, telegrams, memoranda, reports, shipping document information, manuscripts, and speeches. Transcribes dictation from notes or transcribing machine, using special keyboard typewriters, as required, into final or draft form of various types of documents previously referenced, using the style and idiom of the foreign language country. Prepares layouts and types various kinds of manuscript copy from corrected typed drafts. Prepares stencil, spirit, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. May type student tests in foreign language for teachers. May perform clerical and secretarial duties such as filing and indexing, screening telephone calls, greeting visitors, opening and routing mail, reminding employer of appointments, making simple arithmetic computations, answering routine correspondence, and performing other sundry duties as assigned. Works largely on own initiative, but work is subject to review and verification.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Stenographic and Related Work, .388*. Other abilities generally required by employers are taking dictation at a rate of 80–90 wpm, transcribing at a rate of 20–30 wpm, and typing at a rate of 50–60 wpm in the foreign language. (Some variations in these rates may be expected because of vocabulary difficulty level, transcript accuracy demands, consultation of reference materials, and the availability of skills in the local labor market.) Since general clerical and secretarial duties may be performed, stenographic training should include secretarial and receptionist training.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Speed Dictation and Transcription (Shorthand IV)	90
(3) Advanced Speed Dictation and Transcription (Shorthand V)	90
(4) Foreign-Language Shorthand I	90
(5) Foreign-Language Shorthand II	90
(6) Economics and International Trade	30
(7) Advanced Typing and Production Problems (Typing V)	30
(8) Relevant Work Experience	

Public Stenographer–202.388

General

Among the stenographic positions offering the most varied activities is that of public stenographer. These workers may be called upon to take dictation involving terminology in a variety of fields and transcribe that dictation rapidly to letter or report form. Usually, public stenographers do not have a steady routine in any one business area where terminology is standardized or repetitive. Their "calls" may range from the businessman who wants to prepare a letter while on a trip to professionals at a convention who need stenographic services. Rate of activity in a public stenographic service varies, depending on location, from very active to sporadic. Many public stenographers are self-employed. The job description below supplements that of Stenographer B or II.

Job Description

To the basic duties of Stenographer B or II (clerical stenographer) add: The taking and transcribing of dictation, from a variety of individuals, dealing with many different fields of business or in various industries or professions, in a wide variety of working locations. Usually maintains an office in or is employed by a hotel or is available at some other central location easily accessible to transients. May act as a notary public.

Prerequisites for the Occupation

Same as for Stenographer B or II. Elective units include those to develop additional stenographic and typing skills and to expand knowledge of specialized terminologies such as legal, medical, or scientific.

Suggested Training

(1) Same as Stenographer B or II, except delete the unit, Principles of Effective Supervision;

(2) May elect specialized terminology shorthand or advanced machine shorthand studies.

Police Stenographer–202.388

General

The work done by the police stenographer is essentially the same as that performed by Stenographers A or B, I or II, Junior or Senior Stenographers, or Clerk-Stenographers GS–3 or GS–4, except that police stenographers are often concerned with taking deposition or testimony. Much of the stenographic or secretarial work in a particular police department is learned on the job and involves knowledge of the specific procedures of the local police office.

Prerequisites for the Occupation

Clerical and stenographic skills should be equivalent to Stenographer A for entry into these positions. Promotion to a stenographic job in a large municipal police department is often through the local civil service system. On-the-job training arrangements for those interested in police department stenographic work should be made with local police offices.

Suggested Training

(1) Basic Stenographic-Secretarial Program. Additional studies same as items (2) and (3) for Stenographer B;

(2) Relevant Work Experience.

Court Reporter–202.388

General

Although the D.O.T. refers to COURT REPORTER 202.388 (law reporter), a more generally accepted classification and titling for this occupational group is SHORTHAND REPORTER. Shorthand reporters may specialize in court proceedings, parliamentary proceedings, convention reporting, and a variety of freelance work such as found in arbitrations, radio and television, and other situations in which rapid and changing conversation and action are to be recorded. The shorthand reporter must have the highest level of stenographic skills, as well as extensive knowledge of the particular specialized area of work. High pay levels are usually associated with these positions. The description and job prerequisites which follow are those for a shorthand court reporter and are an amplification of the job definition in the D.O.T.

Job Description

Makes verbatim stenographic record, manually or by machine shorthand, of examinations of witnesses, colloquy and argument, depositions, motions, judge's charge to jury, openings and summations to jury, oral decisions of judges, sentences, and other proceedings connected with a trial. Transcribes manual or machine shorthand notes, upon request, either using a typewriter or by dictating material into recording or transcribing machine, immediately during the trial or post trial for appellate purposes. Types copies of any instruments recognized as evidence which do not appear in the shorthand notes containing the record. Completes transcript of minutes of the trial. Records polling of the jury. Marks exhibits. Secures names of litigants, counsels, and witnesses. Prepares copy of appearances for the judge. Makes tallies of peremptory challenges, and records statement of fact when jury is accepted and sworn. Reads manual or machine shorthand notes of portions or all of proceedings to judge and jury upon request. May interrupt proceedings to ask for a restatement due to inaudibility of voices. May supervise work of note readers. Works largely on own initiative and may be self-employed. May work under supervision of judge, attorneys, or court clerk.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Stenographic and Related Work, .388.* Generally required abilities are to take dictation involving legal, medical, accounting, scientific, and police terminology at a rate of 175–225 wpm with 97 percent accuracy, to type straight copy at a rate of 70–90 wpm, and to transcribe at the rate of 50–70 wpm. Good short-term memory is required as well as the ability to read back rapidly from notes during a trial. Hearing, vision, and diction should be good for transcribing into recording or dictating machine or reading back in court. Command of legal terminology and procedure, medical terminology, and engineering terminology should approximate the vocabulary of professionals in those fields. Excellent command of English grammar, vocabulary, including idiomatic expressions, is indicated. Shorthand court reporters should be able to ascertain the nature of the subject matter at issue, the likely context of expert testimony, and be generally familiar with the technical topics and vocabulary which may be used during particular trials.

Suggested Training

		Hours
(1)	Shorthand Principles, Beginning Dictation, Introduction to Transcription, Speed Dictation and Transcription, and Advanced Speed Dictation and Transcription, or	450
	Stenographic Machine Operation I, II, and III (for machine shorthand reporters)	645
(2)	Fundamentals of Typing, Production Typing I, II, and III, and Advanced Typing and Production Problems	250
(3)	Indexing and Filing Practices	30
(4)	Office Machines–Computing and Duplicating	30
(5)	Business Mathematics	30
(6)	Elements of Fiscal Records	60
(7)	Communication and Basic Language Skills	60
(8)	Business Correspondence (additional studies in English grammar will be very helpful)	30
(9)	Accelerated Reading	50
(10)	Business Principles and Organization	60
(11)	Business Terminology	15
(12)	Fundamentals of Business Law	30
(13)	Shorthand Reporter's High Speed Dictation and Transcription, or	1,000 (variable)
	Stenographic Machine Operation IV (for machine shorthand reporters)	700 (variable)
(14)	Court Reporter Training Assignment	2 weeks
(15)	Legal Typewriting (Elective)	60
(16)	Legal Terminology – Dictation and Transcription (Elective)	60
(17)	Medical Terminology–Dictation and Transcription (Elective)	210
(18)	Engineering Terminology – Dictation and Transcription (Elective)	90

Steno-pool Supervisor–209.138

General

In addition to the job definition for Steno-Pool Supervisor which appears in the D.O.T., this occupation may require either general stenography or a specialty area such as medical, legal, scientific, or engineering stenography.

Prerequisites for the Occupation

The worker in this position often requires basic skills in stenographic and secretarial work. Depending on an employer's needs and volume of work, however, some of these positions may not require the incumbent to exhibit stenographic skills. The position requires persons who can exercise independent, mature judgment, solve problems, and coordinate working relationships. The abilities to plan, direct, and control an activity, including the workers engaged therein, are also required. Good clerical preparation is needed to be able to perceive pertinent detail in verbal, tabular, or specialized materials and formats; to observe differences in copy; to proofread words and numbers; and to avoid errors in arithmetic computation.

Suggested Training

Because prior experience and needs vary, trainee programs will have to be tailored specifically to meet individual requirements. As a minimum, the following units should be included:

	Hours
(1) Principles of Effective Supervision	60
(2) Office Administration	30
(3) Personnel Administration Practices	60

Stenographic studies such as machine or handwritten shorthand and typing would be helpful in most instances.

SECRETARIAL JOBS COVERED BY THE GUIDE

Secretary–201.368 and 201.268

General

The D.O.T. defines three related titles, Legal, Medical, and Social Secretary, under the general description of Secretary. It would not appear useful nor practical to prepare curricula for (nor list) each of the specialized secretarial jobs in terms of the industry, work, or profession to which they are related. However, in addition to legal, medical, and social, several other types of secretarial jobs which require special vocational education preparation, on-the-job, or vestibule-type training are also included in this suggested curricula guide. These are: Educational Secretary, Police Department Secretary, Scientific Secretary, Engineering Secretary, Foreign-Language Secretary, and Executive Secretary. Two of these titles, Police Department Secretary (Secretary of Police) and Executive Secretary (Administrative Assistant) will be found in the D.O.T. These jobs are coded 169.268 and 169.168, respectively, indicating that they are executive positions not necessarily related to basic secretarial work. Therefore, they have been excluded from consideration in this guide. The titles Executive Secretary and Police Department Secretary, as used and defined in this guide, are explained separately and are allied with other secretarial positions.

Job definitions or descriptions and prerequisites for each of the secretarial positions covered by this suggested curricula guide, taken from the D.O.T. and from other sources, some of which have been amplified, are included in this section. As in the stenographic classifications, secretaries are often classified as either beginners or senior secretaries by some employers. Assigned responsibilities vary, as does the volume of work. Individual preferences and employer expectations of secretaries vary widely. In certain types of employment situations, salary determinants may have no relevancy to skill or knowledge levels attained by the worker. Some of the job openings and the work performed therein may be associated with customer, public, and other employee contact. In isolated instances, the secretary may be regarded as a "status symbol." There has been no attempt in the training programs to include what every secretarial job may demand. Instead, the concentration has been on general requirements.

Job Description

In addition to the job definition in the D.O.T., the job description should include: Prepares layouts and types finished copy of correspondence and reports from handwritten notes or corrected drafts. Prepares stencil, spirit, or other types of reproducible masters. Produces copies using wet and/or dry process duplicating machines.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Secretarial and Related Work, .268; .368.* Other abilities generally required by employers are taking dictation of general business terminology at a rate of 100–120 wpm, transcribing at a rate of 30–40 wpm, and typing at a rate of 50–60 wpm. (Some slight variations in these rates may be expected because of factors such as availability of skills in local area, employer expectations, vocabulary difficulty level, and accuracy demands.) In addition to the exhibition of normally requisite personal attributes, employers often require secretarial workers to have a rounded office education background. It is often difficult to distinguish between senior stenographic and secretarial competencies because of the similarities of job requirements and demands on the worker. In many instances, basic preparation of certain stenographers and secretaries is identical. Some employers, however, may not require basic stenographic skills, preferring instead to employ the secretary as an aide, administrative assistant, or public or client contact person. Training for these types of positions has not been provided in this guide.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Speed Dictation and Transcription (Shorthand IV)	90
(3) Advanced Typing and Production Problems (Typing V)	30
(4) Office Administration	30
(5) Principles of Effective Supervision	60
(6) Payroll Records	30
(7) Economics and International Trade	30
(8) Money Management	30
(9) Business Correspondence	30
(10) Introduction to Business Data Processing	30
(11) Relevant Work Experience:	
Records Management (Elective)	20
Business Reports (Elective)	15
Stenographic Machine Operation II (for machine shorthand secretaries in lieu of 2 and 3)	135

Legal Secretary–201.368

General

In some law offices, the legal secretary is the entire office staff. In larger law firms, legal secretaries may be classed as beginning or experienced secretaries. The areas and degrees of assigned responsibility and the specialized nature of the work done by the secretary in the law office may vary considerably. While the following job description does not include all the specialized work that may be done by a particular secretary, it covers broadly the work done in offices specializing in criminal or business law.

Job Description

Takes dictation, using manual or machine shorthand, consisting of legal or business terminology and ordinary conversation from attorneys, clients, and witnesses, and of memoranda, correspondence, counsel opinion, testimony, trial notes, and data for completing legal forms. Transcribes dictation, from notes or transcription machine, into final or draft forms. Prepares layouts and types copy from corrected typed drafts or handwritten notes. Prepares spirit, stencil, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. Completes a variety of legal forms. Assists in preparing briefs, drafting of pleadings and legal forms needed by clients, and preparing miscellaneous documents needed in court. Makes and receives payments, sends out statements of account, handles bank transactions and reconciliations, and may maintain books of account. Receives, sorts, and routes incoming mail, posts outgoing mail, sends telegrams, and distributes interoffice memoranda. Greets, interviews, and directs visitors and answers telephone. Arranges interviews and appointments and keeps appointment calendar and daily diary of the firm's activities. Sets up and maintains files, including tickler files and docket register, and reports on same. Maintains office supplies. May obtain source materials and collect other data from office or law library for use by attorney. May open and close office, attend to employer incidentals, and attend special meetings with employer. May supervise other clerical workers. Works largely on own initiative following employer guidelines or may work under close supervision.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit *Secretarial and Related Work, .268; .368.* Other abilities generally required by employers are taking dictation at a rate of 100–140 wpm and typing at a rate of 50–75 wpm. Transcription speed is difficult to establish because of the reference material that must often be consulted, the terminology dictated, and the accuracy required of the finished work. In general, transcribing at the rate of 30–40 wpm should be acceptable.

The legal secretary should be able to exercise independent judgment and be mature in conduct regarding the maintenance of confidences and responsibility for the office in the employer's absence. In addition, the legal secretary must be familiar with legal terminology, courtroom procedures, legal office records and procedures, and business law. Additional studies, such as those for executive secretary, are suggested for upgrading purposes to meet positions requiring a greater degree of responsibility and office supervision.

Suggested Training

		Hours
(1)	Basic Stenographic-Secretarial Program	
(2)	Speed Dictation and Transcription (Shorthand IV)	90
(3)	Advanced Speed Dictation and Transcription (Shorthand V)	90
(4)	Advanced Typing and Production Problems (Typing V)	30
(5)	Legal Typewriting	60
(6)	Legal Terminology–Dictation and Transcription	60
(7)	Legal Office Records and Procedures	60
(8)	Business Correspondence	30
(9)	Principles of Effective Supervision	60
(10)	Payroll Records	30
(11)	Money Management	30
(12)	Court Reporter Training Assignment	2 weeks
(13)	Relevant Work Experience:	
	Economics and International Trade (Elective)	30
	Stenographic Machine Operation II and III (for machine shorthand secretaries in lieu of 2, 3, and 4), to the level of desired proficiency	375 (variable)

Medical Secretary–201.368

General

The D.O.T. job description for this position refers to the work of the medical secretary in general terms and highlights the terminology aspect in addition to normal secretarial duties. A wide variety of work is found in this position since the worker may be employed in a physician's office, hospital admissions office or medical department, medical and medically related associations, pharmaceutical firms, public health facilities, insurance companies, medical laboratories, and research centers. A medical secretary is limited to performing normal secretarial duties. Work emphasizing the medical aspects (assisting the physician in various aspects of his work) requires a medical assistant, which necessitates additional specialized training. A medical secretary should not attempt to perform semitechnical duties without this additional specialized training. The description below is not all inclusive of the medical secretarial job; it focuses on the *office work facilitating* functions rather than the blended job duties relating to work similar to that performed by nurses and laboratory workers.

Job Description

Takes dictation, using manual or machine shorthand, covering varied medical fields and characterized by special medical terminology, from physicians and medical laboratory personnel, of confidential information relating to diagnoses, autopsies, laboratory procedures and results, medical or drug reports, histories, records, interviews, interoffice memoranda, and correspondence. Assists in the preparation of digest medical records, summaries of medical histories, and a variety of technical papers. May take dictation during the performance of operations, autopsies, medical examinations, and interviews with patients. Transcribes dictation, from notes or transcribing machine into draft or final form of manuscript or special medical forms. Prepares layouts and types various kinds of manuscripts from corrected draft copies or handwritten notes. Prepares spirit, stencil or other types of reproducible masters. Produces copies using wet and/or dry process duplicating machines. Composes and mails collection letters and other routine correspondence, or prepares same for physician's signature. Assembles data for use by employer in preparing speeches or for use in court actions. Receives and routes (or may compose answers for) professional or personal incoming mail and posts outgoing mail. Greets patients and other office visitors, with or without appointments, and acts as physician's or employer's representative until physician or employer can be seen. Interviews patients or visitors, according to prescribed routine, to obtain data for records (physician's or hospital's). Makes appointments, under direction, for patients, for professional persons requiring subsequent office visits, or with other persons, professional staffs, departments, or physicians when referrals are involved. Maintains appointment calendar and office visitation records. Maintains receiving area in order and arranges for custodial services. Answers telephone and places outgoing calls for physician or employer. Files and retrieves patient or other records as required. Maintains financial and other records of office involving the receipt of materials or services, collection of due bills and mailing of statements, terms of payment, bank deposits, withdrawals and reconciliations, income tax records, or other personal expenditure records of employer. Arranges with hospitals for admission of patients. Maintains record of employer's itinerary and makes travel arrangements. Prepares workmen's compensation benefit, medical insurance, and other legally required forms for patient and physician, and explains various requirements to patients. Inventories, with or without employer, various office and medical supplies. May reorder supplies in accordance with procedures established by employer. Assigns and conducts patients to examination rooms or special medical departments. Restocks physician's bag. May dispense certain medications under direction of physician. May supervise other office workers. Works on own initiative or may work under close supervision of physician or employer.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Secretarial and Related Work, .268; .368.* Other abilities usually required are taking dictation of medical terminology at a rate of 110–140 wpm, transcribing at a rate of 30–40 wpm, and typing at a rate of 50–70 wpm. The worker should be familiar with many medical words, phrases, and procedures. Other expected duties require knowledge of medical receptionist practices and secretarial functions. The worker must exhibit maturity in judgment, decisions, conduct, and acceptance of responsibility. The medical secretary must also have a liking for public contact and be understanding of and sympathetic to people. Frequent movement is often required and proper reaction to emergency conditions must be evidenced. Working conditions may vary from extremely active small offices, such as a medical records library or a physician's office, to spacious areas of operation. Workers should be able to work alone for extended periods.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Speed Dictation and Transcription (Shorthand IV)	90
(3) Advanced Typing and Production Problems (Typing V)	30
(4) Medical Terminology–Dictation and Transcription	210
(5) Medical Office Practices, Procedures, and Records	140
(6) Hospital Practices, Procedures, and Records	135
(7) Payroll Records	30
(8) Principles of Effective Supervision	60
(9) Business Correspondence	30
(10) Money Management	30
(11) Relevant Work Experience: Stenographic Machine Operation II (for machine shorthand secretaries in lieu of 2 and 3)	135

Engineering Secretary

General

Engineering secretaries may find employment in as wide a variety of engineering offices as there are engineering specialties. Because of the specialization of engineering and engineering practices, documents, and liaison work associated with each, much of the final training must take place on the job in the particular engineering office or department. As in other secretarial positions, workers are classed as beginners or seniors by the degree of assigned responsibility given, or by the status of the position as compared to other secretarial or stenographic positions in the organization. This position is not referenced in the D.O.T. The following job description includes the basic stenographic work of the secretarial position and describes, in general terms, those activities common to work in several different engineering offices. Some employers may assign additional duties.

Job Description

Takes dictation, characterized by specialized engineering terminology, symbols, and formulae, using manual or machine shorthand, of information relating to client and interoffice correspondence, bids, proposals, test and engineering reports, manuscripts being prepared for publication, feasibility studies, customer progress reports, minutes of meetings, and verbatim transcripts of project meetings. Transcribes dictation, from notes or transcribing machine, into final or draft form of previously referenced documents and information. Prepares layouts and types various kinds of manuscript copy from corrected typed drafts or handwritten notes. Types formulae and symbols, using special keyboard typewriters, onto drawings or in special manuscript sections requiring knowledge of scientific and/or engineering typewriting practice. Prepares manuscripts for submission to professional journals. Prepares stencil, spirit, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. Maintains project distribution and control records of classified data, engineering drawings, records, reports, job control sheets, and other engineering material. Performs a variety of specialized duties such as: maintaining records of project material forecasts; maintaining small engineering library; searching files for supplementary materials; preparing purchase order requests, material releases, and requisitions; checking material requests and work releases for completeness and authorized signature; keeping minor project cost control; setting up and using files; maintaining personnel data; and performing simple mathematical computations using office adding machines or calculators. Greets, screens, and directs office visitors to proper engineer or other person. Answers telephone, places outgoing calls, and sets up conference calls. Keeps schedule and calendar of employer's appointments. Serves as liaison with contractors, vendors, clients, and other engineering personnel. Processes, prepares, and checks employer's or staff's expense accounts. Reads, sorts, and routes incoming mail. May set up and maintain security controls for confidential or secret information. May arrange employer itineraries. May be required to be familiar with administrative regulations and procedures and to answer procedural questions. May compose answers to routine correspondence. May supervise engineering stenographers and other clerical personnel. Works largely on own initiative or under close supervision.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in the exhibit, *Secretarial and Related Work, .268; .368.* Other abilities generally expected are taking dictation at a rate of 110–140 wpm, typing at a rate of 60–70 wpm, and transcribing at a rate of 25–40 wpm. (Some variation in these rates may be expected because of vocabulary difficulty level, transcript accuracy demands, consultation of reference materials, and the availability of skills in the local labor market.) The ability to use special keyboard typewriters, a familiarity with engineering terminology and the Greek alphabet, and the ability to use a variety of duplicating and other office machines are also required. Because of the nature of some engineering work, especially secret or confidential government work and research, some workers may be required to meet loyalty and security standards. Maturity in judgment and acceptance of responsibility are additional traits usually sought by employers.

Suggested Training

		Hours
(1)	Basic Stenographic-Secretarial Program	
(2)	Speed Dictation and Transcription (Shorthand IV)	90
(3)	Advanced Typing and Production Problems (Typing V)	30
(4)	Business Correspondence	30
(5)	Payroll Records	30
(6)	Principles of Effective Supervision	60
(7)	Office Administration	30
(8)	Science Survey	60
(9)	Scientific Typewriting	60
(10)	Engineering Terminology—Dictation and Transcription	90
(11)	Engineering Office Practices, Procedures, and Records	80
(12)	Introduction to Business Data Processing	30
(13)	Money Management	30
(14)	Relevant Work Experiences:	
	Stenographic Machine Operation II (for machine shorthand secretaries in lieu of 2 and 3)	135

Scientific Secretary

General

Scientific secretaries work directly with scientists and require on-the-job training to develop high competencies in a particular field of interest. The following job description and the curricula are not all inclusive in the secretarial training required for every field of scientific specialty. Training for working with social scientists such as psychologists and sociologists has not been included, largely because most of the language used in these areas, although containing some technical terminology, is generally familiar. Formats for publication of papers in these fields can be learned on the job as can the filing practices. No reference to the scientific secretary is made in the D.O.T. It should be noted that the job description for this occupation closely parallels that for scientific stenographer, with the emphasis on the public contact and employer assistance aspects of the secretarial function.

Job Description

Takes dictation, characterized by specialized terminology, symbols, and formulae, using manual or machine shorthand, of information relating to correspondence, interoffice memoranda, internal reports, reports prepared for publication in scientific journals, records of experimentation, scientific study and research documents, minutes of meetings, verbatim transcripts of meetings, speeches to be delivered to professional and lay groups, and notes for classroom use. Transcribes dictation, from notes or transcribing machine, into final or draft form of previously referenced documents. Prepares layouts and types various kinds of manuscript copy from corrected typed drafts or handwritten notes. Types formulae and symbols, using special keyboard typewriters, onto drawings or in special manuscript sections requiring knowledge of scientific typewriting practice. May type data for computer input. Prepares manuscripts, according to prescribed formats, for submission to professional journals. Prepares stencil, spirit, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. Performs clerical duties such as filing and indexing. Maintains scientific records and information control according to prescribed security regulations, maintains small scientific libraries, uses reference sources for gathering supplemental materials required for reports, performs simple arithmetic calculations. Orders supplies as directed. Greets, screens, and routes office visitors to appropriate person. Answers telephone and places outgoing and conference calls. Prepares employer itineraries and makes travel and meeting arrangements. Maintains schedule and reminds employer of appointments. Processes requisitions and expense accounts. Maintains office supplies. Serves as liaison with other personnel or departments. Reads, sorts, and routes incoming mail and may compose answers to routine correspondence. May be involved in patent work with attorneys. May assist scientist with speech preparation, lecture preparation, and other educational functions. May assist in minor laboratory work. May supervise other office personnel. Works largely on own initiative or may work under close supervision.

Prerequisites for the Occupation

The worker in this position should exhibit those characteristics described in the Worker Requirements and Qualifications Profile included in the exhibit, *Secretarial and Related Work, .268; .368.* Other abilities generally expected are taking dictation at a rate of 110–140 wpm, typing at a rate of 60–70 wpm, and transcribing at a rate of 25–40 wpm. (Some variations in these rates may be expected because of vocabulary difficulty level, transcript accuracy demands, consultation of reference materials, and the availability of skills in the local labor market.) The ability to use special keyboard typewriters, a familiarity with special scientific terminology, and the ability to use a variety of office duplicating and calculating machines are also required. Because of the nature of certain scientific work, some workers may be required to meet loyalty and security standards. Maturity in judgment and acceptance of responsibility are additional traits sought by employers. Secretaries wishing to extend their knowledge in a particular field may elect to take other science courses which are available at junior or community colleges.

Suggested Training

		Hours
(1)	Basic Stenographic-Secretarial Program	
(2)	Speed Dictation and Transcription (Shorthand IV)	90
(3)	Advanced Typing and Production Problems (Typing V)	30
(4)	Business Correspondence	30
(5)	Payroll Records	30
(6)	Principles of Effective Supervision	60
(7)	Office Administration	30
(8)	Science Survey	60
(9)	Scientific Typewriting	60
(10)	Organic Chemistry Terminology–Dictation and Transcription	120
(11)	Physical Sciences Terminology–Dictation and Transcription	120
(12)	Introduction to Business Data Processing	30
(13)	Money Management	30
(14)	Relevant Work Experience:	
	Stenographic Machine Operation II (for machine shorthand secretaries in lieu of 2 and 3)	135

Foreign-Language Secretary

General

This position is not referenced in D.O.T. as is Foreign-Language Stenographer. The two positions are similar in many ways, except that the foreign-language secretary usually has a greater scope of action and is involved primarily with public contact and employer assistance services.

Job Description

Takes foreign-language dictation, using manual or machine shorthand, of correspondence, telegrams, memoranda, reports, shipping document information, manuscripts, and speeches. Transcribes dictation, from notes or transcribing machine, using special keyboard typewriters as required, into final or draft form of various types of documents previously referenced, using the style and idiom of the foreign language country. Prepares layouts and types various kinds of manuscript copy from corrected typed drafts. Prepares stencil, spirit, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. Translates incoming letters, telegrams, and reports from foreign language into English and vice versa. Prepares reports. Greets office visitors and refers to appropriate person. Receives, sorts, and routes incoming mail. Records and reminds employer of appointments. Performs such clerical duties as filing, recordkeeping, and posting of mail. May attend to sundry personal records of employer. May act as interpreter for visitors. May travel with employer to foreign countries. Works on own initiative or may work under close supervision.

Prerequisites for the Occupation

The worker in this position should have those characteristics described in the Worker Requirements and the Qualifications Profile included in the exhibit, *Secretarial and Related Work, .268; .368.* Other abilities usually required are being proficient in a foreign language; taking dictation in the foreign language at a rate of 80–90 wpm, typing at a rate of 50–60 wpm, and transcribing at the rate of 25 wpm or better. If employed in an import-export firm, a familiarity with geography and international trade is desirable.

Suggested Training

		Hours
(1)	Basic Stenographic-Secretarial Program	
(2)	Speed Dictation and Transcription (Shorthand IV)	90
(3)	Advanced Speed Dictation and Transcription (Shorthand V)	90
(4)	Advanced Typing and Production Problems (Typing V)	30
(5)	Foreign-Language Shorthand I	90
(6)	Foreign-Language Shorthand II	90
(7)	Economics and International Trade	30
(8)	Payroll Records	30
(9)	Business Correspondence	30
(10)	Money Management	30
(11)	Principles of Effective Supervision	60
(12)	Office Administration	30
(13)	Relevant Work Experience	

Educational Secretary

General

This occupation is not referenced in the D.O.T. Employment levels vary from part-time workers to the full-time, college-trained, professional educational secretary in an educational association. Skill levels required in stenography, typing, and transcription range widely from those equivalent to beginning stenographer and upward. Some educational secretary positions are characterized more by public contact and clerical work routines rather than by stenographic skills. The job description and prerequisites below encompass a range of educational secretarial work. The National Association of Educational Secretaries, a department of the National Education Association, maintains detailed job descriptions for a number of jobs in this occupation. Many positions in this occupation are civil service. In some cities or states, a stated number of college credits may be required.

Job Description

Composes, edits, and prepares bulletins, schedules, memoranda, and routine correspondence. Takes and transcribes dictation of correspondence, minutes of meeting, and speeches, using shorthand notes or dictating machine. Types stencils, spirit, or other types of reproducible masters. Produces copies, using wet and/or dry process duplicating machines. Receives and routes mail. Prepares and may assist in evaluating a variety of statistical and confidential reports, including students' and faculty transcripts dealing with school records and activities of students and staff. Serves as liaison between principal, teachers, pupils, parents, and the general public. Greets, interviews, and directs visitors to appropriate person. Arranges appointments and maintains calendar of appointments for administrator or principal. Organizes and maintains files and records. Answers telephone inquiries and refers to proper person. Assists with the preparation of materials and facilities for special meetings. Notifies substitute teachers, directs them to classroom, and answers inquiries. Performs compiling and computing operations necessary for the preparation of assigned reports. Prepares catalog material. Maintains supplies for office. May maintain tape library and teach operation of language laboratory equipment. May assist in grading objective-type tests. May participate in ordering special laboratory equipment. May assist local parent-teacher associations with arranging use of school facilities and in typing and duplicating materials. May assist with enrollment of students to secure necessary information for school records. May handle receipt of monies for a variety of student activities. May perform minor accounting and cashiering duties, including bank reconciliations. May supervise and train clerical assistants. May plan and organize work for other clerical workers or offices. May work under close supervision or on own initiative. May exercise wide latitude of judgment, decision, and scope of action as secretary to educational association.

Prerequisites for the Occupation

The worker in this position, whether at entry or senior level, should exhibit those characteristics described in the Worker Requirements and in the Qualifications Profile included in the exhibit, *Secretarial and Related Work, .268; .368.* Other abilities usually required are taking dictation at a rate of 80–120 wpm, typing at a rate of 50–60 wpm, and transcribing at a rate of 20–40 wpm. Maturity, good judgment, and the ability to maintain confidences are required. Ability to assist in evaluations of records may also be required.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Speed Dictation and Transcription (Shorthand IV)	90
(3) Advanced Typing and Production Problems (Typing V)	30
(4) Money Management	30
(5) Business Correspondence	30
(6) Principles of Effective Supervision	60
(7) Payroll Records	30
(8) Introduction to Business Data Processing	30
(9) School System Practices and Administration	30
(10) Education Office Records and Procedures	60
(11) Relevant Work Experience: Stenographic Machine Operation II (for machine shorthand secretaries in lieu of 2 and 3)	135

Elective units may be studied to conform with municipal or State requirements.

Police Department Secretary

General

This position is not referenced in the D.O.T. A closely associated title is Secretary of Police—375.168, which is largely a police department job on an administrative level.

Prerequisites for the Occupation

Secretaries working in a police department should possess the basic clerical and stenographic skills and worker trait requirements associated with SECRETARY 201.368. On-the-job training arrangements for trainees wishing to enter this area of secretarial work should be made with local police departments. In some municipal police departments, normal entry into secretarial jobs is through the local civil service system.

Social Secretary–201.268

The job description for this position, defined in the D.O.T., characterizes the work to be done. It should be noted, however, that the position often requires that the incumbent perform many of the duties associated with Secretary 201.368 and Executive Secretary as included in this guide. The bases for choosing social secretaries are not easily described. For example, some employers may choose the person for this position on the basis of acquaintance or family background; others may be more impressed with the education or the exhibited poise, maturity, and intelligence of the individual. The position is one of trust with personal affairs, and confidence in the person by the employer is of paramount consideration. Some social secretaries may not need the basic stenographic or secretarial skills normally required in secretarial positions. There are some areas of study that can be useful to aspirants for this position as well as to incumbents. These are: Money Management, Principles of Effective Supervision, Secretarial Orientation, Personal Development, and the Typing series (to the extent needed). Elements of Fiscal Records, Payroll Records, and Receptionist and Telephone Training can also be helpful. Shorthand studies may be elected by persons in these positions who need to refresh or acquire these skills because of employer requirements.

Executive Secretary

General

This title is one which is used in two ways. It is given to those persons holding administrative posts in corporations and associations, and also to those workers who are secretaries to top executives, division heads, or department heads. In this guide, the curriculum for Executive Secretary is directed toward the latter concept of the position rather than to preparation for the administrative post associated with this title. Executive secretaries may be found in any business or professional field. As a consequence, some employers insist on a number of years of experience within a particular field. Others may prefer a secretary with a diversified background of experience. Some employers may insist on a college degree with a specified major. Surveys by the secretarial associations show that the majority of executive secretaries prepared themselves for advancement by continuing their education beyond the high school secretarial offerings and by combining further education with their work experience. Since the post of Executive Secretary is a sensitive one, employers are often more impressed with the personal attributes of the worker, such as personality, behavior, maturity, poise, tact, and flexibility, rather than by the technical skills exhibited. The executive-secretary relationship is usually a close one, and compatibility is the prime factor in retention. It is therefore difficult to define rigorously one set of personal attributes which would characterize the success of any individual in this post. The job description below does not appear in the D.O.T. It is general in nature, since positions may vary in character with the type of work performed by the executive or the employing firm.

Job Description

Takes dictation, using manual or machine shorthand, of a variety of correspondence (general and specialized), interoffice memoranda, reports, and minutes of meetings. Transcribes dictation, from notes or transcribing machine, into final or draft form. Types final copy from corrected drafts or handwritten notes. Prepares reproducible masters, and may produce copies using wet and/or dry process duplicating machines. Composes correspondence for employer and may transmit either under own signature or that of employer. Maintains schedule of employer appointments. Greets, screens, interviews, and directs office visitors. Answers telephone and places outgoing and conference calls. Sets up filing methods and records management controls. May develop forms, compile procedures manual, make process charts, and simplify work methods. May edit house organ and bulletins. May assist in writing public relations releases, preparing speeches, and compiling annual reports. Trains, assigns, and supervises other office personnel. Makes travel arrangements for employer. May interview job seekers. Performs clerical duties as may be assigned. Attends to personal sundries as requested by employer. Acts as employer's representative in his absence. Works largely on own initiative. Work may or may not be subject to close review.

Prerequisites for the Occupation

Several routes may be taken to prepare for this position, and the areas of study can be fairly diverse. Prime concern in this guide is for development of the basic secretarial skills and the administrative knowledges and skills which are common to the position. Several specialized office education units have been included in the curriculum which are not necessarily administrative in character, but which are important to implementing certain functional duties often expected.

The worker should exhibit those characteristics described in the Worker Requirements and the Qualifications Profile included in the exhibit, *Secretarial and Related Work, .268; .368.* In addition, employers usually expect the secretary to take dictation at a rate of 100–140 wpm, type at a rate of 55–65 wpm, and transcribe at a rate of 30–35 wpm or better. The worker should exhibit a high degree of fluency in correct English, have complete mastery of secretarial-clerical skills, and be orderly and accurate in the performance of work. The worker also should have a good understanding of business, office administration, and personnel practices, be able to supervise and train others effectively, be able to design forms as needed, compile procedures manuals in conjunction with the employer, and be able to systematize and control various types of records. Desirable personal characteristics include poise, maturity, and the ability to accept many responsibilities. Workers may elect any of the several specialized areas of secretarial preparation or take special courses in areas closely allied to the work presently performed. These elective courses may be taken in junior or senior colleges, institutes, or adult education programs. It is suggested that some of the specialized and administrative office education units be studied by Executive Secretary aspirants after they have had a number of years of actual work experience.

Suggested Training

	Hours
(1) Basic Stenographic-Secretarial Program	
(2) Secretarial Program with either manual or machine shorthand, or completion of a specialized secretarial program, including Relevant Work Experience, Advanced Speed Dictation and Transcription (Shorthand V) (Elective), or	90
Stenographic Machine Operation III (Elective)	240
If trainees have had several years of secretarial experience, the following units are suggested:	
(3) Personnel Administration Practices	60
(4) Office Administration	30
(5) Executive Secretarial Development	30
(6) Executive Secretarial Practices	30
(7) Forms Design	20
(8) Procedures Writing	15
(9) Records Management	20
(10) Business Reports	15

OCCUPATIONAL AND TRAINING ANALYSES

Information from the D.O.T., the assembled job descriptions in this guide, and information from the professional contributors were used to identify the component skills, functional duties and requirements, and environmental knowledges needed by workers to perform adequately in the various occupations. This identification served as a guide for preparation of the topical content in the curricula. Skills, functional requirements, and environmental knowledges were further subdivided into those necessary to a particular position, those that would be helpful in terms of accepting added responsibilities (meeting employer needs and preparing for advancement), and those that are supplemental in helping to enlarge the trainee's perspective of the world of work. The requirements are shown, in general terms, in the subsection, Occupational Analyses. As illustrations: *recording* skills include the recording of job progress reports, requisitions, expense accounts, and miscellaneous data; *general typing* includes typing general business letters, office memoranda, reports, requisitions, and school or business forms; and *general shorthand* includes manual or machine shorthand to take dictation, except for specialized terminology. Very high speed and multiple dictation are classed as separate skills in the shorthand area.

In addition to the occupational analyses, this section of the guide discusses relevant work experiences in general, and suggests the schools which may offer basic, specialized, or administrative units of study. This categorization is quite broad and undoubtedly many exceptions exist. For example, shorthand may be given in all types of educational institutions.

OCCUPATIONAL ANALYSIS

The following tabulations show various skills and functional requirements and the jobs to which they apply:

Required Skills	*Applicable Jobs*
Filing, indexing, recording, proofreeding, arithmetic or calculating, proper use of English language and grammar, speed reading.	All.
General shorthand, typing, transcription, operating duplicating machine, operating transcribing machine.	All—except social secretary and steno-pool supervisor.
Receiving visitors, answering telephone, composing correspondence, mailing, simple fiscal and payroll recording, producing manuscripts.	All secretaries—except social secretary.
Operating adding machine	All secretaries—except social; engineering and scientific stenographers.
Proficiency in foreign language	Foreign-language stenographer and secretary.
Using special typewriters, knowing special professional terminology.	Court reporter; medical, legal, foreign-language, scientific and engineering stenographers and secretaries; note-reader.
Very high speed shorthand, typing, and transcription	Court reporter.
Supervisory practices	Executive secretary; steno-pool supervisor; social secretary.

Helpful Skills	*Applicable Jobs*
General shorthand, typing, and transcription	Social secretary; steno-pool supervisor.

Helpful Skills	*Applicable Jobs*
Operating adding machine, receiving visitors, answering telephone, producing manuscripts, simple fiscal recording, mailing, composing correspondence.	All stenographers; court reporter.
Supervisory practices	All secretaries; senior stenographer.

Functional Duties and Requirements	*Applicable Jobs*
Acceptable office and social behavior, good oral communication, proper dress and grooming, making and scheduling appointments, cancelling appointments, using reference sources, using office equipment and supplies, maintaining office in order, practicing basic office procedures.	All.
Knowing professional office and court practices, record processing, and procedures.	Medical, legal, scientific, and engineering stenographers and secretaries; court reporter.
Knowing school system and educational office practices, record processing, and procedures.	Education secretary.
Knowing international trade practices and currency, processing of shipping documents.	Foreign-language secretary.
Knowing fundamentals of business law	All secretaries; legal stenographer; court reporter.
Knowing personnel administration practices, setting up and managing business offices.	Steno-pool supervisor; executive secretary.
Writing procedures, designing forms, managing records, writing business reports, knowing secretarial practices.	Executive secretary.
Managing personal and householders' finances	Social secretary.

Helpful Functional Duties and Requirements	*Applicable Jobs*
Managing personal finances	All.

Supplemental (Environmental) Knowledge	*Applicable Jobs*
Economics—the American economy, business data processing fundamentals.	All secretaries—except social secretary.
Business terminology, basic business principles and organization.	All.

RELEVANT WORK EXPERIENCE

Relevant work experience projects are set forth for each position in the section, *Relevant Work Experience*. Relevant work experiences may be obtained in a variety of ways. They may be gained through direct work-experience programs or through simulated or intensive laboratory-learning programs. The regulations governing cooperative programs are found in Section 104.16 of Part 104—Administration of Vocational Education, Federal Allotments to States, Rules and Regulations, of the Vocational Education Act of 1963. Directed work experience and simulated experience programs should supplement regular study plans to provide realistic opportunities to practice developed skills and knowledge. Flexibility of scheduling can be provided by counselors and school administrators to allow work-experience project time to be concurrent with the final phases of a course of study or as employability standards for the career objective occupation of the trainee are achieved.

Youth organizations which offer work experience complementary to the course of study may also be employed as vehicles to provide relevant work experiences, insofar as they are supervised in accordance with Section 104.13 (1) of the Rules and Regulations.

SCHOOL OFFERINGS

The matrix below identifies the various occupations and levels covered by the curricula and indicates the educational facility at which the studies may be offered.

Occupation	General O.E. units						Specialized O.E. units						Administrative O.E. units		
	High school	Postsecondary	Junior college	MDTA	(Area) supplemental	Collegiate	High school	Postsecondary	Junior college	MDTA	(Area) supplemental	Collegiate	MDTA	Junior college	Collegiate
Level 1															
Clerk-stenographer (CS-3 and 4)	X	X	X	X	X	----	----	----	X	X	----	----	----	----	----
Stenographer — Print shop	X	X	X	X	X	----	----	X	X	X	----	----	----	----	----
Public stenographer	X	X	X	X	X	----	----	X	X	X	X	----	----	----	----
Note reader or Stenotype operator (unclassed as to specialty)	X	X	X	X	X	----	----	X	X	X	X	----	----	----	----
Level 2															
Legal stenographer	X	X	X	X	X	----	----	X	X	----	X	----	----	X	----
Foreign-language stenographer	X	X	X	X	X	----	----	X	X	----	X	----	----	----	----
Medical stenographer	X	X	X	X	X	----	----	X	X	----	X	----	----	----	----
Engineering stenographer	X	X	X	X	X	----	----	X	X	----	X	----	----	----	----
Scientific stenographer	X	X	X	X	X	----	----	X	X	----	X	----	----	----	----
Police stenographer	X	X	X	X	X	----	----	X	X	----	----	----	----	----	----
Secretary (girl friday, clerical stenographer)	X	X	X	X	X	----	----	X	X	X	X	X	----	X	X
Court reporter	X	X	X	X	X	----	----	X	X	----	X	X	----	X	X
Level 3															
Police department secretary	X	X	X	X	X	----	----	----	----	----	X	X	----	----	X
Medical secretary	X	X	X	X	X	X	----	X	X	----	X	----	----	X	X
Legal secretary	X	X	X	X	X	X	----	X	X	----	X	----	----	X	X
Education secretary	X	X	X	X	X	X	----	----	----	----	----	X	----	----	X
Foreign-language secretary	X	X	X	X	X	X	----	X	X	----	X	X	----	X	X
Scientific secretary	X	X	X	X	X	X	----	X	X	----	X	----	----	X	X
Engineering secretary	X	X	X	X	X	X	----	X	X	----	X	----	----	X	X
Steno-pool supervisor	----	----	----	----	----	----	----	X	X	----	----	----	----	X	X
Executive secretary	X	X	X	X	X	X	----	X	X	----	X	X	----	X	X
Social secretary	----	----	----	----	----	X	----	----	----	----	----	X	----	----	X

ABOUT THE CURRICULA

Many factors had to be considered in the design of the curricula to provide trainees with realistic preparation for the occupational field. Implementation of the curricula in associated schools offering either, or both, general and specialized units of study was also considered. This section explains how various factors affected the curricula design.

TRAINING POPULATION

The Vocational Education Act of 1963 and the Manpower Development and Training Act provide funds for training of in-school persons, persons who are employed and wish to upgrade skills, unemployed or underemployed persons who wish to develop new skills according to their abilities and aptitudes, and persons whose previously learned skills have fallen into disuse and who need refreshment of these skills to reenter the labor market. Age, experience, and educational continuity that would characterize possible participants in the various programs had to be weighed in order to provide for continuous training to the proficiency levels desired and to tailor specific programs to meet individual needs. As a consequence, many units of study evidence overlap or repetition of content. This overlap should provide opportunity for review and refreshment. It is suggested that teachers, supervisors, and administrators carefully consider group or class composition based on assessment of individual achievements and training needs by counselors and teachers. If achievement and aptitude testing is accomplished before a trainee enters the program, counselors and teachers should be better able to make recommendations of tailored programs to meet individual career objectives. Teachers should continually assess the progress of every trainee in each unit, and discuss and plan for the remedial work that may be required. Teachers should also determine whether the trainee would profit from continuing his course of study.

Because of the variation in the eligible training population, some units may be given in the evening or in part-time programs. The courses of study for the occupations are sufficiently flexible to permit their adaptation to the time available by either limiting the program "load" or extending the daily or total hours of particular units.

JOB DESCRIPTIONS

The D.O.T. job titles and definitions were used to identify most of the jobs covered by the curricula Precision in identifying job titles, especially those of executive secretary and technical stenographers and secretaries, resulted in the detailed job descriptions explained in a preceding section. The purity of each job and job description in the occupational field posed a problem. Overlap exists between the duties of stenographers and secretaries because of employer utilization and expectations and because of the worker's personal aspirations to status and identification with other jobs in the occupational field. Often the worker must be prepared to cope with tasks and exhibit knowledge and abilities exceeding that of the impersonal job description. In each program of study, provision has been made to develop skills and knowledges of the trainee to more than "just meet" minimal requirements. This feature should provide motivation for the worker to pursue further office education and thus prepare for advancement.

LINES OF ADVANCEMENT

Clear-cut lines of job progression are not found in the occupational field except possibly for civil service practice, such as from GS-3 to GS-4 to GS-5 grades. Thus, it is difficult to establish levels of personal achievement such as improved stenographic skills which would result in automatic advance. In addition to the basic skills, other variables of employment such as skills availability in the labor market, personal interest, intelligence, appearance, loyalty, experience, and tenure are often weighed in employer considerations of promotion. The curricula design permits trainees in any position or course of study to elect, subject to advice from the counselor, certain units which might further their career objectives.

The educational programs for each job, shown in the *Curricula Synopses* section, are intended to qualify the trainee for jobs in any of three levels as follows:

Level 1. Entry office worker positions and upgrading to skilled office worker positions
Level 2. Entry office technician positions and upgrading to specialized office positions
Level 3. Entry office administrative positions and upgrading to executive administrative assistant positions

The levels for the jobs covered by the curricula are shown below:

Level 1

Clerk-Stenographer (GS-3 and 4)
Stenographer—Print shop
Public stenographer
Note reader
Stenotype operator (unclassed as to specialty)

Level 2

Legal stenographer
Foreign-language stenographer
Medical stenographer
Engineering stenographer
Scientific stenographer
Police stenographer
Secretary (girl friday, clerical stenographer)
Court reporter

Level 3

Police department secretary
Medical secretary
Legal secretary
Education secretary
Foreign-language secretary
Scientific secretary
Engineering secretary
Steno-pool supervisor
Executive secretary
Social secretary

Classification into levels indicates the degree to which the worker must be specialized or at which the worker assumes minor administrative responsibilities. The levels do not indicate the extent or intensiveness of study required or suggested in this guide nor the degree to which employers distinguish between them. Neither are they indicative of the salary levels associated with the positions. The social secretary, for instance, may or may not need to possess stenographic skills. A senior legal stenographer may be called upon to supervise beginning or junior legal stenographers. A public stenographer or shorthand reporter may be self-employed, a consideration which is not part of their normal job duties as described herein. If the person's work requires proficiency in a specialized or administrative area, for the purpose of job retention or advancement, the particular course of study can be tailored or extended to include the needed units of study.

STARTING AND CONTINUING OFFICE EDUCATION

The possible variation in the time at which office vocational education may be started by each trainee was a factor influencing curricula design. Some in-school trainees may elect to start vocational preparation in the eleventh grade of high school; others may wait until after graduation from high school and start in a post-secondary school. Mobility of the training population was also considered. Rather than comparing offerings of one school with another, the curricula design provides for continuation of studies, regardless of the school in which vocational preparation was initiated and provided that the trainee meets the specific prerequisites for the unit of study. Almost all of the units specify standards of achievement to be met by the trainee. Where the standards are expressed in quantified terms, the achievement of the standards (rather than grades) by the trainee would indicate his eligibility for advanced units of study.

Certain units in the skills areas are numbered.

This was done to facilitate continuing study from secondary to post-secondary schools and to simplify transcripts. Coordination of school offerings in a given district or area can be facilitated in most instances by reference to the achievement standards.

SPECIALIZATION STUDIES

The study units are divided into three sections: General, Specialized, and Administrative Office Education Units. This permits using one or several facilities in an area to complete the basic vocational preparation required for entry into specialized work. It also permits a district to offer certain specialized programs in one location and others at a different location. Further, the grouping of trainees of like career objectives from different locations within the district can be effected.

Many of the specialized units of study are needed for certain jobs. In other cases, where they are helpful in attaining a proficiency, they can be electives.

Specialization is also included in the General Office Education Unit studies. For example, a trainee may elect manual or machine shorthand and pursue either to the proficiency level needed for work in a particular job.

ADMINISTRATIVE AND INDETERMINATE STUDY PROGRAMS

Because of the requirements of certain positions, especially the social and executive secretarial jobs, a definite program of study is difficult to design for any given group of individuals. Differences in experience, education, and employer expectations of trainees will affect the training required. Similarly, secretaries or senior stenographers who need supervisory training may elect specified administrative units after discussing their situations with the counselor. The steno-pool supervisory position has a suggested program to meet the supervisory requirements of the position. The Basic Stenographic-Secretarial Program is strongly suggested for this position, even though some steno-pool supervisory jobs can be performed without the person having the basic stenographic skills.

SUBJECT UNIT ALTERATION

The suggested units of study do not attempt to provide the extent of detailed subject coverage usually associated with teachers' manuals or other curriculum materials. The descriptions for each unit of study include some teaching and evaluation suggestions which may be helpful. Insofar as possible, an attempt has been made to provide a chronological sequence of topics in each unit of study. Because such factors as the differences of trainee knowledge and skills may be disparate in any given group, the extent of review, methods of presentation, and the topical sequence is left to the discretion of the teacher and/or department supervisor. In addition, teachers and administrators are encouraged to develop detailed lesson plans and to use ingenuity in devising or using various teaching aids to accelerate learning time. Helpful, recent texts and materials are listed under each unit. Others are listed in the appropriate appendix sections. Many materials should be previewed before selections are made.

The stenographic machine units show accelerated time. This notation has been included to be helpful to special offerings preparing note readers or others who may have a good typing background to acquire this particular stenographic skill. Other units can be shortened similarily by close consideration of trainee skills.

GENERAL PRESENTATION SUGGESTIONS

Trainees enrolled in the program are expected to have completed approximately 10 years of formal education and to have a working knowledge of English and elementary arithmetic. Several of the units allow for a review of these important basic areas, but the depth of needed review in each course unit must be assessed by the local instructor.

In the skill development subjects, lectures and discussions should be kept to the minimum required for understanding procedures and operating instructions. As much time as possible should be devoted to actual trainee practice with the available equipment.

In the social subjects, a variety of methods should be used. Role playing, case study, group discussions, lectures, and motion pictures can all be used effectively. Varied presentation can serve to heighten interest, participation, and learning. Although a special unit has not been included in the curricula for developing proper study habits, teachers and administrators should stress this area. Many booklets and pamphlets are available for helping trainees with this important topic.

Periodic progress checks should be made throughout the course of study of each unit to evaluate trainee progress toward meeting the suggested standards of achievement. In addition, these checks will serve as a guide to review material that may not have been learned fully.

The teacher should consider using community resources for training. Guest speakers from business, trade and professional associations, and industry can assist with special topics and can help trainees relate their activities to local business needs and standards.

Motivation and morale building should be a part of every class and practice period. It is suggested that teachers make an effort early in the program to establish a teaching climate which will heighten and maintain the trainee's interest. The success of the program can be judged only by the number of trainees who will remain gainfully employed in careers which would otherwise not have been available to them.

REMEDIAL INSTRUCTION

The Vocational Education Act provides remedial work for trainees who may be experiencing difficulties in a course of study for an occupation. Counselors and teachers alike should be alert to trainee handicaps and take appropriate steps to provide remedial training. One of these remedial areas which is highlighted in the curricula is Oral Communication. The teacher should not hesitate to recommend this elective unit to persons who require remedial speech training.

OVERLEARNING

Each course or unit of study provides opportunity for the trainee to overlearn rather than merely meet minimal occupational requirements. This is important, since there is often a time lag between completion of the studies and employment or subsequent learning. In addition to the curricula, adjunctive and relevant work-experience projects have been suggested to help in overlearning skills and knowledges.

RELEVANT WORK EXPERIENCE PROJECTS AND STANDARDS OF ACHIEVEMENT

The simulated or on-the-job experiences provided as part of the total curricula design serve not only the purpose of overlearning a skill, but also help the individual trainee improve on other prior achievements. This improvement will help in those occupations where *accuracy* is required above that indicated in the final unit of study for the occupation.

CURRICULA OUTLINES

GENERAL OFFICE EDUCATION UNITS

Unit title	*Code*	*Hours*
Shorthand Principles (Shorthand I)	S–I	90
Beginning Dictation (Shorthand II)	S–II	90
Introduction to Transcription (Shorthand III)	S–III	90
Speed Dictation and Transcription (Shorthand IV)	S–IV	90
Advanced Speed Dictation and Transcription (Shorthand V)	S–V	90
Stenographic Machine Operation I	SM–I	270
Stenographic Machine Operation II	SM–II	135
Stenographic Machine Operation III	SM–III	240
Fundamentals of Typing (Typing I)	T–I	70
Production Typing I (Typing II)	T–II	70
Production Typing II (Typing III)	T–III	40
Production Typing III (Typing IV)	T–IV	40
Advanced Typing and Production Problems (Typing V)	T–V	30
Secretarial Orientation	SO	40
Personal Development	PD	40
Secretarial Procedures and Practices	SPP	40
Indexing and Filing Practices	IFP	30
Office Machines–Computing and Duplicating	OM	30
Receptionist and Telephone Training	RTT	15
Business Mathematics	BM	30
Elements of Fiscal Records	EFR	60
Payroll Records	PR	30
Communication and Basic Language Skills	BLS	60
Oral Communication	RC	15 (variable)
Accelerated Reading	AR	50
Business Correspondence	BC	30
Business Principles and Organization	BPO	60
Business Terminology	BT	15
Fundamentals of Business Law	BL	30
Introduction to Business Data Processing	BDP	30
Economics and International Trade	ES	30
Money Management	MM	30

SPECIALIZED OFFICE EDUCATION UNITS

Legal Terminology–Dictation and Transcription	LTD	60
Legal Typewriting	LT	60
Legal Office Records and Procedures	LOR	60

Stenographic Machine Operation IV–Shorthand Reporting	SM–IV	700 (variable)
Shorthand Reporter's High Speed Dictation and Transcription	SRD	1,000 (variable)
Court Reporter Training Assignment	CR	2 weeks
Medical Terminology–Dictation and Transcription	MD	210
Medical Office Practices, Procedures, and Records	MP	140
Hospital Practices, Procedures, and Records	HP	135
Science Survey	SS	60
Scientific Typewriting	ST	60
Engineering Terminology–Dictation and Transcription	ET	90
Engineering Office Practices, Procedures, and Records	EP	80
Organic Chemistry Terminology–Dictation and Transcription	OC	120
Physical Sciences Terminology–Dictation and Transcription	PS	120
Foreign-Language Shorthand I	FL I	90
Foreign-Language Shorthand II	FL II	90
School System Practices and Administration	SA	30
Education Office Records and Procedures	EO	60
Procedures Writing	PW	15
Forms Design	FD	20
Records Management	RM	20
Business Reports	BR	15

ADMINISTRATIVE OFFICE EDUCATION UNITS

Office Administration	OA	30
Executive Secretarial Practices	ESP	30
Executive Secretarial Development	ESD	30
Principles of Effective Supervision	PES	60
Personnel Administration Practices	PA	60

CURRICULA SYNOPSES

Since many of the occupational training programs have identical subject units for certain periods of time, trainees with different career objectives may be grouped for certain of the units, thus effecting conservation of teaching time, space, facilities, and equipment. The programs shown below are suggested for intensive training either under the Vocational Education Act of 1963 or the Manpower Development and Training Act. Special units of study required in local areas are not shown.

General education and special State required subjects of study are not shown in the typical programs. Administrators and teachers incorporating these types of studies in the vocational training program may provide for them by extending the programs shown. For example, the typing and shorthand sequence can be lengthened by presenting the units for one hour each day rather than the suggested two hours. Another way to include other required study units is by deferring certain of the suggested units until a later time in the program. In each instance, factors such as massed vs. distributed practice, motivation and orientation to the world of work, and isolation of skills development must be considered carefully along with school enrollment, availability of teachers' time, teachers' workload, and required facilities.

Trainees requiring specially tailored programs suited to their particular needs, such as refreshing or upgrading of skills, can be slotted into the schedule for appropriate units, and separate arrangements made for special studies. Although remedial study units such as Oral Communication are not shown, special programs should be developed where deficiencies exist.

Programs are assumed to be continuous. Normal semester lengths are not indicated. Provisions for vacation time, free periods, etc., should be made by State and local school administration. Units of shorter duration in particular programs are shown with suggested follow-ons. The training day is assumed to be six hours. Luncheon periods, home room time, and counseling time are not shown. Reference should be made to the *Relevant Work Experience* section for trainees who may be nearing completion of their programs. Codes for the subject units in the program are shown in the *Curricula Outlines* section.

BASIC STENOGRAPHIC-SECRETARIAL PROGRAM

This program is basic education for most of the jobs in the occupational field. It is not required for social secretary, note reader, court reporter or steno-pool supervisor trainees. Certain units of this

Program week	Suggested units (hour of training day)						Alternate units (hour of day)	
	1	2	3	4	5	6	5	6
1 to 3	BLS	T–I	T–I	BT	BPO	BPO	----------	----------
4 to 6	BLS	T–I	T–I	SO	BPO	BPO	----------	----------
7	BLS	T–I	T–I	SO	S–I	S–I	SM–I	SM–I
8 to 11	BLS	T–II	T–II	SO	S–I	S–I	SM–I	SM–I
12	BLS	T–II	T–II	PD	S–I	S–I	SM–I	SM–I
13 to 14	BL	T–II	T–II	PD	S–I	S–I	SM–I	SM–I
15	BL	AR	T–III	PD	S–I	S–I	SM–I	SM–I
16 to 18	BL	AR	T–III	PD	S–II	S–II	SM–I	SM–I
19	BM	AR	T–III	PD	S–II	S–II	SM–I	SM–I
20 to 22	BM	AR	T–III	SPP	S–II	S–II	SM–I	SM–I
23	BM	AR	T–IV	SPP	S–II	S–II	SM–I	SM–I
24	BM	AR	T–IV	SPP	S–II	S–II	SM–I	SM–I
25 to 27	EFR	EFR	T–IV	SPP	S–III	S–III	SM–I	SM–I
28 to 30	EFR	EFR	T–IV	OM	S–III	S–III	SM–I	SM–I
31 to 33	IFP	IFP	RTT	OM	S–III	S–III	SM–I	SM–I

program can be studied by note reader and court reporter trainees and may be electives for social secretary trainees. It is suggested that to achieve greater competency in their jobs, steno-pool supervisor trainees study the stenographic, typewriting, indexing and filing, office machines, accelerated reading, and language skills units. Trainees have the option of choosing manual or machine shorthand as a foundation skill.

Relevant work experience should be provided for those trainees who have completed the basic program. Stenographer-print shop trainees may include a course in the fundamentals of printing in conjunction with their work experience.

Trainees completing the tabulated units are stenographer (A, I, beginning, or junior), police stenographer, or stenographer-print shop.

STENOGRAPHIC-SECRETARIAL SPECIALIZATION PROGRAMS

These programs apply to trainees continuing their studies, for specialization in given fields, beyond the suggested basic program. Demonstrated proficiencies equivalent to achievement standards for units in the basic program, or completion of the basic program, are acceptable for entry into specialization for most of the jobs. Time is expressed in numbered weeks continuing from the end week of the basic program. Excepted jobs and suggested training for them are treated separately.

Stenographer (B, II, Senior, or GS–4) and Public Stenographer Program

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39	S–IV	S–IV	T–V	PES	PES	BC
40 to 42	S–IV	S–IV	Relevant work experience projects			
43 to 47	Relevant work experience					

The above program is for trainees who elect manual shorthand. For trainees who elect machine shorthand as a foundation skill, substitute SM–II for S–IV and T–V. In all programs that follow where substitution of SM–II for S–IV and T–V is indicated, one hour of home practice is assumed. Public stenographer trainees may elect other specialized units in addition to the above, such as advanced manual shorthand, advanced machine shorthand, or specialized terminology shorthand of choice. This will extend training time accordingly before relevant work experience phase.

Legal Stenographer (D.O.T. 202.388) Program

The program below is for trainees who elect manual shorthand. For trainees who elect machine shorthand, substitute SM–II for S–IV and T–V. SM–II requires an additional practice hour which can be done at home. SM–III can be elected by trainees with machine shorthand in place of S–V. SM–III will require an additional two hours of practice which may be done at home. They may leave SM–III when the desired proficiency level has been obtained.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39	S–IV	S–IV	T–V	BC	LT	LOR
40 to 42	S–IV	S–IV	LTD	LTD	LT	LOR
43 to 45	S–V	S–V	LTD	LTD	LT	LOR
46 to 51	S–V	S–V	Relevant work experience projects			
52 to 55	Relevant work experience					

Legal Secretary (D.O.T. 201.368) Program

The program for these trainees is the same as for legal stenographer through week 45. The training program beyond week 45 is shown below.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
46 to 51	S–V	S–V	MM	Elective	PES	PES
52 to 54	PR	PR	Relevant work experience projects			
55 to 56	CR	CR	CR	CR	CR	CR
57 to 61	Relevant work experience					

Legal secretary trainees with machine shorthand as a foundation skill may substitute SM–III for S–V, and may be permitted to leave after attaining dictation speeds in the 140–150 wpm range. Economics and International Trade (30 hours) is an elective.

2

CURRICULA SYNOPSES

Since many of the occupational training programs have identical subject units for certain periods of time, trainees with different career objectives may be grouped for certain of the units, thus effecting conservation of teaching time, space, facilities, and equipment. The programs shown below are suggested for intensive training either under the Vocational Education Act of 1963 or the Manpower Development and Training Act. Special units of study required in local areas are not shown.

General education and special State required subjects of study are not shown in the typical programs. Administrators and teachers incorporating these types of studies in the vocational training program may provide for them by extending the programs shown. For example, the typing and shorthand sequence can be lengthened by presenting the units for one hour each day rather than the suggested two hours. Another way to include other required study units is by deferring certain of the suggested units until a later time in the program. In each instance, factors such as massed vs. distributed practice, motivation and orientation to the world of work, and isolation of skills development must be considered carefully along with school enrollment, availability of teachers' time, teachers' workload, and required facilities.

Trainees requiring specially tailored programs suited to their particular needs, such as refreshing or upgrading of skills, can be slotted into the schedule for appropriate units, and separate arrangements made for special studies. Although remedial study units such as Oral Communication are not shown, special programs should be developed where deficiencies exist.

Programs are assumed to be continuous. Normal semester lengths are not indicated. Provisions for vacation time, free periods, etc., should be made by State and local school administration. Units of shorter duration in particular programs are shown with suggested follow-ons. The training day is assumed to be six hours. Luncheon periods, home room time, and counseling time are not shown. Reference should be made to the *Relevant Work Experience* section for trainees who may be nearing completion of their programs. Codes for the subject units in the program are shown in the *Curricula Outlines* section.

BASIC STENOGRAPHIC-SECRETARIAL PROGRAM

This program is basic education for most of the jobs in the occupational field. It is not required for social secretary, note reader, court reporter or steno-pool supervisor trainees. Certain units of this

Program week	Suggested units (hour of training day)						Alternate units (hour of day)	
	1	2	3	4	5	6	5	6
1 to 3	BLS	T–I	T–I	BT	BPO	BPO	----------	----------
4 to 6	BLS	T–I	T–I	SO	BPO	BPO	----------	----------
7	BLS	T–I	T–I	SO	S–I	S–I	SM–I	SM–I
8 to 11	BLS	T–II	T–II	SO	S–I	S–I	SM–I	SM–I
12	BLS	T–II	T–II	PD	S–I	S–I	SM–I	SM–I
13 to 14	BL	T–II	T–II	PD	S–I	S–I	SM–I	SM–I
15	BL	AR	T–III	PD	S–I	S–I	SM–I	SM–I
16 to 18	BL	AR	T–III	PD	S–II	S–II	SM–I	SM–I
19	BM	AR	T–III	PD	S–II	S–II	SM–I	SM–I
20 to 22	BM	AR	T–III	SPP	S–II	S–II	SM–I	SM–I
23	BM	AR	T–IV	SPP	S–II	S–II	SM–I	SM–I
24	BM	AR	T–IV	SPP	S–II	S–II	SM–I	SM–I
25 to 27	EFR	EFR	T–IV	SPP	S–III	S–III	SM–I	SM–I
28 to 30	EFR	EFR	T–IV	OM	S–III	S–III	SM–I	SM–I
31 to 33	IFP	IFP	RTT	OM	S–III	S–III	SM–I	SM–I

program can be studied by note reader and court reporter trainees and may be electives for social secretary trainees. It is suggested that to achieve greater competency in their jobs, steno-pool supervisor trainees study the stenographic, typewriting, indexing and filing, office machines, accelerated reading, and language skills units. Trainees have the option of choosing manual or machine shorthand as a foundation skill.

Relevant work experience should be provided for those trainees who have completed the basic program. Stenographer-print shop trainees may include a course in the fundamentals of printing in conjunction with their work experience.

Trainees completing the tabulated units are stenographer (A, I, beginning, or junior), police stenographer, or stenographer-print shop.

STENOGRAPHIC-SECRETARIAL SPECIALIZATION PROGRAMS

These programs apply to trainees continuing their studies, for specialization in given fields, beyond the suggested basic program. Demonstrated proficiencies equivalent to achievement standards for units in the basic program, or completion of the basic program, are acceptable for entry into specialization for most of the jobs. Time is expressed in numbered weeks continuing from the end week of the basic program. Excepted jobs and suggested training for them are treated separately.

Stenographer (B, II, Senior, or GS-4) and Public Stenographer Program

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39--	S-IV	S-IV	T-V	PES	PES	BC
40 to 42--	S-IV	S-IV	Relevant work experience projects			
43 to 47--	Relevant work experience					

The above program is for trainees who elect manual shorthand. For trainees who elect machine shorthand as a foundation skill, substitute SM-II for S-IV and T-V. In all programs that follow where substitution of SM-II for S-IV and T-V is indicated, one hour of home practice is assumed. Public stenographer trainees may elect other specialized units in addition to the above, such as advanced manual shorthand, advanced machine shorthand, or specialized terminology shorthand of choice. This will extend training time accordingly before relevant work experience phase.

Legal Stenographer (D.O.T. 202.388) Program

The program below is for trainees who elect manual shorthand. For trainees who elect machine shorthand, substitute SM-II for S-IV and T-V. SM-II requires an additional practice hour which can be done at home. SM-III can be elected by trainees with machine shorthand in place of S-V. SM-III will require an additional two hours of practice which may be done at home. They may leave SM-III when the desired proficiency level has been obtained.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39--	S-IV	S-IV	T-V	BC	LT	LOR
40 to 42--	S-IV	S-IV	LTD	LTD	LT	LOR
43 to 45--	S-V	S-V	LTD	LTD	LT	LOR
46 to 51--	S-V	S-V	Relevant work experience projects			
52 to 55--	Relevant work experience					

Legal Secretary (D.O.T. 201.368) Program

The program for these trainees is the same as for legal stenographer through week 45. The training program beyond week 45 is shown below.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
46 to 51--	S-V	S-V	MM	Elective	PES	PES
52 to 54--	PR	PR	Relevant work experience projects			
55 to 56--	CR	CR	CR	CR	CR	CR
57 to 61--	Relevant work experience					

Legal secretary trainees with machine shorthand as a foundation skill may substitute SM-III for S-V, and may be permitted to leave after attaining dictation speeds in the 140-150 wpm range. Economics and International Trade (30 hours) is an elective.

2

Medical Stenographer (D.O.T. 202.388) Program

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39	S–IV	S–IV	T–V	MD	MD	MD
40 to 42	S–IV	S–IV	Study	MD	MD	MD
43 to 47	HP	HP	HP	MD	MD	MD
48 to 51	HP	HP	HP	Study	MP	MP
52 to 61	Relevant work experience				MP	MP

Medical stenographer trainees with machine shorthand as a foundation skill should substitute SM–II for S–IV and T–V in the above program.

Medical Secretary (D.O.T. 201.368) Program

The program for medical secretary trainees is the same as that for medical stenographer trainees through week 47. The program below shows continuation studies for medical secretary trainees beginning with week 48.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
48 to 51	HP	HP	HP	BC	MP	MP
52 to 53	MM	PES	PES	BC	MP	MP
54 to 57	MM	PES	PES	Study	MP	MP
58 to 60	Elective		PR	PR	MP	MP
61	Relevant work experience projects				MP	MP
62 to 66	Relevant work experience					

Engineering Stenographer Program

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39	S–IV	S–IV	T–V	SS	SS	Study
40 to 42	S–IV	S–IV	ST	ST	ET	ET
43 to 45	EP	EP	ST	ST	ET	ET
46 to 48	EP	EP	Elective		ET	ET
49 to 50	EP	EP	Relevant work experience projects			
51 to 53	Relevant work experience					

Engineering stenographer trainees with machine shorthand as a foundation skill should substitute SM–II for S–IV and T–V in the above program.

Engineering Secretary Program

The program for engineering stenographer trainees applies for engineering secretary trainees through week 45. The program below shows continuation studies for engineering secretary trainees from week 46 on.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
46 to 48	EP	EP	BC	BDP	ET	ET
49 to 50	EP	EP	BC	BDP	PES	PES
51	PR	PR	BC	BDP	PES	PES
52 to 53	PR	PR	MM	OA	PES	PES
54	MM	OA	Study		PES	PES
55 to 57	MM	OA	Relevant work experience projects			
58 to 61	Relevant work experience					

Scientific Stenographer Program

Program week	Suggested units (hour of training day)						
	1	2	3	4	5	6	
34 to 39	S–IV	S–IV	T–V	Study	SS	SS	
40 to 42	S–IV	S–IV	ST	ST	PS	PS	Home Study/OC
43 to 45	PS	PS	ST	ST	OC	OC	
46 to 50	PS	PS	OC	OC	OC	Study	
51	PS	PS	Relevant work experience projects				
52 to 55	Relevant work experience						

For scientific stenographer trainees with machine shorthand as a foundation skill, substitute SM–II for S–IV and T–V. Home Study/OC one hour per day during program weeks 43–45.

Scientific Secretary Program

Program week	Suggested units (hour of training day)						
	1	2	3	4	5	6	
34 to 39	S–IV	S–IV	T–V	BC	SS	SS	
40 to 42	S–IV	S–IV	ST	ST	PS	PS	
43 to 45	PS	PS	ST	ST	OC	OC	Home Study/OC
46 to 50	PS	PS	OC	OC	OC	OA	
51	PS	PS	BDP	PR	PR	OA	
52 to 53	PES	PES	BDP	MM	PR	PR	
54	PES	PES	BDP	MM		R.W.E. projects	
55 to 56	PES	PES	BDP	MM		R.W.E. projects	
57	PES	PES	Study	MM		R.W.E. projects	
58 to 61	Relevant work experience						

For scientific secretary trainees with machine shorthand as a foundation skill, substitute SM–II for S–IV and T–V. Home Study/OC one hour per day during program weeks 43–45.

Foreign-Language Stenographer (D.O.T. 202.388) Program

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39	S–IV	S–IV	ES	FL–I	FL–I	Study
40 to 42	S–IV	S–IV	Elective	FL–I	FL–I	T–V
43 to 45	S–V	S–V	Elective	FL–II	FL–II	T–V
46 to 51	S–V	S–V	Study	FL–II	FL–II	Study
52 to 55	Relevant work experience					

Foreign-Language Secretary Program

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39	S–IV	S–IV	ES	FL–I	FL–I	BC
40 to 42	S–IV	S–IV	OA	FL–I	FL–I	T–V
43 to 45	S–V	S–V	OA	FL–II	FL–II	T–V
46 to 48	S–V	S–V	MM	FL–II	FL–II	Study
49 to 51	S–V	S–V	MM	FL–II	FL–II	Study
52 to 54	PES	PES	PR	PR	R.W.E. projects	
55 to 57	PES	PES	Relevant work experience			
58	Relevant work experience					

Secretary (D.O.T. 201.368) Program

Secretarial trainees who are not specializing should have completed the basic stenographic-secretarial program or exhibit equivalent proficiencies. The program below is suggested for continuation studies from week 34 on.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39	S–IV	S–IV	T–V	PES	PES	BC
40 to 41	S–IV	S–IV	BDP	MM	ES	OA
42	S–IV	S–IV	BDP	MM	ES	OA
43 to 45	PR	PR	BDP	MM	ES	OA
46 to 50	Relevant work experience					

Secretarial trainees with machine shorthand as a foundation skill should substitute SM–II for S–IV and T–V in the above program. Records Management (20 hours) and Business Reports (15 hours) are electives.

Educational Secretary Program

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
34 to 39	S–IV	S–IV	T–V	PES	PES	BC
40 to 42	S–IV	S–IV	BDP	SA	EO	EO
43 to 45	MM	OA	BDP	SA	EO	EO
46 to 48	MM	OA	PR	PR	R.W.E. projects	
49 to 53	Relevant work experience					

In some States or municipalities, a number of college credits or studies are required for educational secretaries. These studies should be arranged for at the local level. Educational secretary trainees who have machine shorthand as a foundation skill should substitute SM–II for S–IV and T–V in the above program.

Police Department Secretary Program

The program for these trainees should be the same as for Secretary 201.368. Often the police department entry jobs require applicants to pass a civil service examination. On-the-job training may be arranged with local police departments for relevant work experience.

Social Secretary (D.O.T. 201.268) Program

Programs for these trainees should be tailored to fit their particular backgrounds. For suggested elective units, see the social secretary description in the section, *Job Descriptions, Occupational Prerequisities, and Suggested Training.*

Executive Secretary Program

Trainees for executive secretarial positions should have finished the basic stenographic-secretarial program and either the Secretary (D.O.T. 201.368) Program or one of the specialized programs such as legal, medical, educational, engineering, or scientific secretary. Demonstrated proficiencies equivalent to achievement standards of the units in the aforementioned programs should be acceptable. Several years of experience in responsible secretarial positions may also be taken as evidence qualifying trainees for entry into the executive secretary training program.

Because of the variations in education and experience that may be offered by the trainees, the program shown below should be tailored to meet the needs of trainee groups. Program weeks are shown beginning with week 1.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	BR	PW	S–V[1]	S–V[1]	ESP	ESD
4 to 6	FD	RM	S–V[1]	S–V[1]	ESP	ESD
7	FD	RM	S–V[1]	S–V[1]	OA[2]	MM[2]
8 to 12	PES[2]	PES[2]	PA	PA	OA[2]	MM[2]
13	PES[2]	PES[2]	PA	PA	Elective	

[1] This unit is required only for trainees who have not already achieved the level of proficiency specified for this occupation, and it needs to be taken only until this level of proficiency is attained. Trainees with machine shorthand as a foundation skill may substitute SM–III for S–V in the program. This will require 2 hours of home study.

[2] These units should be studied only if the trainee has not had them in the Secretary 201.368 program.

Trainees should also elect other units according to need.

Stenotype Operator (D.O.T. 202.388) Program or Note Reader Program

Trainees for these positions should study SM–I, SM–II, SM–III, T–I, T–II, T–III, and T–IV. The basic stenographic-secretarial program could be helpful. It is strongly suggested that trainees include units in business law and legal terminology in their programs.

Court Reporter (law reporter) (D.O.T. 202.388) Program or Shorthand Reporter Program

Because shorthand reporter trainees may offer different educational backgrounds, the program suggested below should be kept flexible. Language skill for these trainees should be very high. Elec-

Manual Shorthand Reporter's Program

Program week	Suggested units (hour of training day)						
	1	2	3	4	5	6	
1 to 6	BPO	BPO	S–I	S–I	T–I	T–I	
7	BLS	BM	S–I	S–I	T–I	T–I	
8 to 9	BLS	BM	S–I	S–I	T–II	T–II	
10 to 12	BLS	BM	S–II	S–II	T–II	T–II	
13 to 14	BLS	BT	S–II	S–II	T–II	T–II	
15	BLS	BT	S–II	S–II	T–III	AR	
16 to 18	BLS	Study	S–II	S–II	T–III	AR	
19 to 21	IFP	IFP	S–III	S–III	T–III	AR	
22	EFR	EFR	S–III	S–III	T–III	AR	
23 to 24	EFR	EFR	S–III	S–III	T–IV	AR	
25 to 27	EFR	EFR	S–III	S–III	T–IV	OM	
28 to 30	BC	BL	S–IV	S–IV	T–IV	OM	
31 to 33	BC	BL	S–IV	S–IV	T–V	Elective[1]	
34 to 36	LTD[2]	LTD[2]	S–IV	S–IV	T–V	Elective[1]	
37 to 39	LTD[2]	LTD[2]	S–V	S–V	ET[2]	ET[2]	
40 to 45	Elective[1]	Elective[1]	S–V	S–V	ET[2]	ET[2]	
46 to 59	MD[2]	MD[2]	MD[2]	SRD	SRD	SRD	Home Study/SRD
59 to proficiency level desired				SRD	SRD	SRD	Home Study/SRD
2 weeks after completion	Court reporter training assignment						

[1] Elective may be Legal Typewriting (LT) for 6 weeks, 2 hours each day.

[2] Electives of specialized terminology dictation units.

tives in specialized terminology studies such as medical, legal, or engineering should be available. Trainees who complete the basic stenographic-secretarial program or demonstrate equivalent proficiencies should have specially tailored programs. The program above includes only requisite skill and knowledge development units and assumes no prior stenographic training.

Machine Shorthand Reporter's Program

Shorthand reporters with machine training should substitute SM–I, for S–I, S–II and S–III; SM–II for S–IV and T–V (may require one hour of home study); SM–III for S–V (requires two hours of home study) and SM–IV for SRD. Also, these trainees may eliminate LTD and LT (elective).

Steno-Pool Supervisor (D.O.T. 209.138) Program

It is suggested that steno-pool supervisor trainees complete the basic stenographic-secretarial program. However, some steno-pool supervisory jobs may not require stenographic skills. The program below suggests a course of study geared to meeting the supervisory demands of the position.

Program week	Suggested units (hour of training day)					
	1	2	3	4	5	6
1 to 3	PES	PES	PA	PA	OA	PW
4 to 6	PES	PES	PA	PA	OA	

SELECTION, GUIDANCE, AND COUNSELING

Section 104.18 (a) of the Rules and Regulations of the Vocational Education Act of 1963 declares that State plans for vocational education should include information on the "standards and requirements of vocational guidance and counseling services which are designed to (1) identify and encourage the enrollment of individuals needing vocational education, (2) provide the individuals with information necessary for realistic vocational planning, (3) assist them while pursuing the plan, (4) aid them in vocational placement, and (5) conduct follow-up procedures to determine the effectiveness of the vocational instruction and guidance and counseling program."

Section 104.18 (b) states that in addition to vocational guidance consultative services to be provided that "the State Board shall utilize the resources of the State employment service pursuant to the operative arrangement provided for in § 104.7." Section 104.7 details the mutual sharing of information by the State employment service and the local educational agency regarding present and future prospects of employment in the community and elsewhere, and the occupational qualifications of trainees who have completed or are completing vocational education courses in schools. Community advisory committees comprising employers, employment office personnel, educators, and counselors can be used advantageously to fulfill this requirement.

To meet all these requirements and the others detailed in the State plan, the school's vocational guidance counselor must be the focal point to make information available for the selection of trainees and for giving them, their teachers, and their employers the necessary assistance to insure that trainees can obtain and retain employment, and that they can advance in their jobs.

An additional stipulation of Section 104.13 (b) (2) is that each trainee will have an occupational objective which is a matter of record. This objective will be referred to as a career objective and can be a specific recognized occupation or a cluster of closely related occupations in a given field.

These suggestions are offered to assist counselors, teachers, and others in the selecting and guiding of trainees. Specific State plans may detail which selection instruments, procedures, and criteria are to be used for specific occupational fields. The criteria and selection devices suggested are those which can be considered for the occupational field covered by these curricula.

SELECTION CRITERIA

Section 104.13 (g) (1) of the Rules and Regulations provides for the admission of individuals on the basis of their potential for achieving competence in the occupational field. Part (2) of this section provides for the admission of individuals to special remedial classes if these individuals have academic, socio-economic, and other handicaps that have prevented or might prevent their success in other vocational educational programs.

For the purposes of this curricula guide, the selection standards below are suggested for trainees eligible under the Vocational Education Act of 1963. Manpower Development and Training Act selection criteria are shown later.

A. Completion of at least 9th grade, and preferably 10th grade, of high school with acceptable academic achievement. Prior academic achievement results should be evaluated with discretion in the overall evaluation of the applicant. Greatest weight should be given to social studies, English, arithmetic, and typewriting, if these courses were completed earlier than the 10th grade. Prior academic achievement results are usually good indicators of future success in course studies. However, they should not be the sole criteria because of the possibility of "late-blooming" and because of economic, social, or other handicaps which may have influenced earlier schooling. Consideration should also be given to maturity. Those adults eligible for training under the Act who have been away from school may have acquired good personal education and experience in the intervening years.

B. Scores on aptitude tests should also be considered in selection of the applicants. Tests should be carefully chosen on the basis of their ability to discriminate between successful and unsuccessful trainees. Coefficients of validity (or determination) should be considered carefully, along with the criteria used. Standardization of the tests, along with norm group factors and extensiveness of available data and test intercorrelations, also should be considered. Tests, of course, should be only one factor in overall evaluation of applicants. The Qualifications Profile in the job definition exhibits in the section, *About the Dictionary of Occupational Titles* should be consulted.

Some tests suggested for consideration are:

1. Minnesota Clerical Aptitude Tests
2. Iowa Test of Basic Skills
3. Differential Aptitude Tests
4. General Aptitude Test Battery
5. Holzinger-Crowder Uni-Factor Tests
6. Strong Vocational Interest Blank
7. General Clerical Test (Psychological Corporation)
8. SRA Clerical Aptitudes Test
9. Purdue Clerical Adaptability Test
10. Turse Clerical Aptitudes Test
11. Short Employment Tests
12. Turse Shorthand Aptitude Test
13. Kuder Preference Record
14. E.R.C. Stenographic Aptitude Test
15. Byer's Shorthand Test

Other tests not listed above, but which may have high validities, should also be considered; the list is not restrictive. Counselors selecting tests should consult the Mental Measurements Yearbooks, various test issuing and scoring companies' catalogs, and reference works on psychological testing before deciding which tests should be used. Teachers should obtain as much professional help in this area of applicant testing as possible. The purpose of the test is to obtain objective information about the applicant. It should be appreciated that errors can be made in selection and appraisal even with good cut-off scores. The applicants' frame of mind should also be considered when evaluating test results.

C. Applicants having skills developed before entry into the training programs should be evaluated carefully by standardized achievement tests of skills such as shorthand, typing and transcription, and office machine operation. Knowledge in various study areas can be assessed by using available objective tests that are used in the regular program. The measurable skills should be compared to the standards of achievement for the particular program unit and to the occupational prerequisites for each job. The demonstrated equivalent proficiencies can then be used as a base to tailor programs for the individual trainee which will enable him to reach employable competencies without the necessity of marking time.

D. Interviewing is an essential part of the appraisal process since it offers the opportunity to feed back test scores and appraisals to that point, and it can help the applicant to decide on a career objective. Whether the interview is held non-directively or is structured, it should center on the applicant developing optimism about success in a given occupation and the productive use of his aptitudes and other assets. The decision made by the applicant regarding his career objective, and the career objective itself, should become a matter of school record. The career objective should be set before the trainee enters any program.

Counselors and coordinating teachers should also consider that success in a given field may be achieved by persons of different interests and abilities. Obvious evidences of possible failure in a given occupational choice, because of lack of aptitude in the most requisite skills, should be carefully considered during both appraisal and subsequent interviews.

AFTER ENROLLMENT

After a trainee has been selected for the program, periodic counselor-teacher-trainee conferences should be scheduled. Effort should be made to uncover problems that may hinder the success of the trainee in his studies and necessary remedial study should be offered. Throughout the program, teachers should advise counselors of the progress the trainee is making toward attaining required skills and knowledges for employment.

RELEVANT WORK EXPERIENCE PHASE

Counselors should play an integral part in the placement activities and should work with local placement offices, employers, and coordinating teachers to select suitable employment which will further a trainee's skills before the start of regular employment.

During the work-training period, and also at its conclusion, the coordinating teacher, trainee, and counselor should schedule conference time to ascertain the development and experiences of the trainee in attempting to attain employable skills and knowledge.

Prior to the completion of the work experience phase, counselors should consult with local placement offices, according to State plan requirements, for the eventual placement of the trainee into a regular position.

EVALUATION AND REPORTING

Counselors should continually assess the value of the program studies, in terms of adequate vocational preparation, and should suggest changes in curricula content to strengthen individual programs.

TAILORING PROGRAMS

Individuals who demonstrate certain achievements, can be "slotted" into regular programs, both basic and specialized. This requires a certain degree of flexibility of scheduling. Advice on special needs of individuals should be given to the trainee's teachers.

RECORD OF COMPLETION

After completing or leaving a course of study, each trainee should receive a Record of Completion. The Record should not only reflect the skills and knowledges attained during the program, but it should also indicate exhibited skills for which no unit of study was incorporated into the program. If the tailored program included a unit to advance the development of exhibited skills and knowledge, and the unit was not studied because of the lack of available time, no recording should be made about that unit in the Record. All reports of skill knowledge for the various subject units of study should be made by the administrator's office at the time of exit or upon completion of the program by the trainee. The school office should maintain a folder for each trainee which contains the employability evaluations made for every unit of study. It is further suggested that the school maintain at least two copies of the Record for transcript and reference purposes. If the form is standardized within a particular State, trainees moving from one school to another should be asked to submit (for the record) their Record of Completion. Achievements in studies at the new school (s) should be entered in the Record. A suggested sample Record is illustrated.

MANPOWER DEVELOPMENT AND TRAINING ACT ENROLLEES

The selection and evaluation procedures described for the Vocational Education Act of 1963 can also be used with trainees who are eligible under the M.D.T.A. program. Certain limitations that apply to trainees under the Vocational Education Act of 1963 do not apply to the M.D.T.A. trainees. Intense M.D.T.A. programs may be used for entry, refresher, or upgrading purposes. Tailoring of programs is also necessary for some persons in this group. By law, local employment offices initiate selection and placement of these candidates. Counselors should be familiar with local employment office selection procedures. Many of the units in this curricula are similar to those in M.D.T.A. programs for stenographic and secretarial occupations.

STATE OF ____________

RECORD OF COMPLETION OF OFFICE VOCATIONAL EDUCATION

(Under The Vocational Education Act of 1963 or Manpower Development and Training Act)

TRAINEE'S NAME: ____________

TRAINING PROGRAM: ____________

SCHOOLS ATTENDED: ____________

SKILLS

Manual Shorthand-Business Terminology ____________

Machine Shorthand-Business Terminology ____________

Shorthand-Special Terminology ____________

Typewriting-General ____________

Typewriting-Special ____________

Transcription (specify terminology) ____________

Calculators ____________

Duplicators ____________

Reading Speed ____________

Receptionist and Telephone ____________

FUNCTIONAL AREAS (TEACHERS' Evaluations)

Secretarial Practices and Procedures ____________

Business Mathematics ____________

Elements of Fiscal Records ____________

Payroll Records ____________

Language Skills ____________

Business Correspondence ____________

Personal Development ____________

Forms Design ____________

Business Reports ____________

Procedures Writing ____________

Records Management ____________

BASIC KNOWLEDGE AREAS (Tests and Teachers' Evaluation)

Business Law (for secretaries) ____________

Fundamentals of Business Date Processing ____________

Economics and International Trade ____________

SPECIALIZED FUNCTIONS AND KNOWLEDGES (Teachers' Evaluation)

Medical Office Practices, Procedures, and Records ____________

Hospital Office Practices, Procedures and Records ____________

Legal Office Records and Procedures ____________

Court Reporter Training Assignment ____________

Science Survey ____________

Engineering Office Practice, Procedures and Records ____________

School System Practices and Administration ____________

Education Office Records and Procedures ____________

Office Administration ____________

Executive Secretarial Practices ____________

Principles of Effective Supervision ____________

Personnel Administration Practices ____________

Executive Secretarial Development ____________

ATTESTATION

PRINCIPAL ____________

SCHOOL ADMINISTRATOR ____________

DATE ____________

PRINCIPAL ____________

SCHOOL ADMINISTRATOR ____________

DATE ____________

Suggested Record of Completion Form

GENERAL OFFICE EDUCATION UNITS

General office education units are those studies that are common to most of the jobs in the occupational field. The studies should help the trainees develop:

1. *Basic skills* such as manual or machine shorthand, typing, transcription, arithmetic or computation, office-machine operation, basic fiscal and payroll recording, office receptionist duties, telephoning, indexing and filing, and language facility.
2. *Specific knowledge* in areas such as business terminology, elements of business law, and business data processing fundamentals, which will enable the trainee to function adequately in office activities.
3. *Functional requirement* practices such as secretarial orientation, procedures and practices, personal development, and good speech.
4. *Initial understanding* of the office environment and business practices.

Trainees may elect either manual or machine shorthand. Counselors should explain this carefully. Trainees should be tested for eye-hand coordination, short-term memory, and clerical ability before discussing electives with the counselor.

Local or State requirements for general education courses at secondary or post-secondary school levels have not been included in this guide.

SHORTHAND PRINCIPLES (Shorthand I)

Basic Job Skill for Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily Total: 90 hours

Description and Teaching Suggestions

This is a foundation skill development unit for trainees electing written shorthand. The unit outline can be used to teach either a symbolic or an abbreviated alphabetic system. In addition to study of the abbreviated forms through reading and writing, the trainees learn to take verbatim dictation and to transcribe from text plates as well as from their own notes. Transcription may be oral, handwritten, or typewritten. Supervised laboratory practice periods are designed to reinforce in-class instruction to further develop skill.

Repetitive review and recall of shorthand words and phrases should be used to develop required motor skills. Both group and individual reading should be used in the early part of the program. Easy, familiar, and repetitive short "takes" are suggested. New matter dictation should be presented only after trainees have completed the theory of shorthand.

Spelling and vocabulary skills may be developed concurrently with the introduction of theory words. The importance of correct punctuation and spelling should be stressed from the very beginning.

Use of dictation records and tapes will accelerate progress. Where dictation laboratories are available, individuals may progress at their own rate. If a dictation laboratory is not available, group trainees according to ability and simulate the laboratory using a record player, tape recorder, and dictation by teachers.

Standards of Achievement

1. Transcribe, with at least 95 percent accuracy, familiar material dictated at:
   a. 60 to 80 wpm for three minutes, or
   b. 50 to 70 wpm for five minutes.
2. Transcribe, with at least 95 percent accuracy, unfamiliar material dictated at a median rate of 60 wpm for three minutes.

NOTE: Error rate (in percent)

$$= \frac{\text{Number of words transcribed incorrectly}}{\text{Number of words per minute} \times \text{number of minutes}} \times 100$$

Prerequisite for Study of Shorthand Principles

Fundamentals of Typing (may be concurrent study).

Topic Outline

I. Introduction to Shorthand
II. Reading and Construction of Shorthand Words and Abbreviations
III. Dictation
IV. Spelling
V. Vocabulary
VI. Punctuation
VII. Pre-transcription Training

TOPIC I. INTRODUCTION TO SHORTHAND

A. Vocational opportunities for beginning stenographers:
    1. Business
    2. Industry
    3. Government
B. Abilities needed for development of shorthand skill:
    1. Listening
    2. Reading
    3. Writing
    4. Phonetic association
    5 Symbol recognition
    6. Spelling
    7. Punctuation
    8. Word understanding
C. The nature of shorthand:
    1. Symbolic systems
    2. Alphabetic systems

TOPIC II. READING AND CONSTRUCTION OF SHORTHAND WORDS AND ABBREVIATIONS

A. Symbolic systems:
    1. Simple strokes and words
    2. Principles of joining
    3. Brief forms and brief form derivatives
    4. Phrases
    5. Word beginnings and endings
    6. Omission of sounds and letters
B. Abbreviated alphabetic systems:
    1. Understanding and application of rules for formation of word abbreviations
    2. Understanding and application of rules for brief words and phrases

TOPIC III. DICTATION

A. Familiar material practiced and previewed
B. Familiar material previewed
C. Unfamiliar material previewed

TOPIC IV. SPELLING

TOPIC V. VOCABULARY

TOPIC VI. PUNCTUATION

A. Apostrophe
B. Brace and brackets
C. Colon
D. Comma
E. Dash
F. Ellipses
G. Exclamation point
H. Hyphen
I. Parentheses
J. Period
K. Question mark
L. Quotation marks
M. Semicolon

TOPIC VII. PRE-TRANSCRIPTION TRAINING

A. Oral transcription:
    1. From text plates
    2. From student homework notes
    3. From dictation notes
B. Handwritten transcription:
    1. From text plates
    2. From diction notes
C. Typewritten transcription:
    1. From text plates
    2. From homework notes
    3. From dictation notes

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AVANCENA, MANUEL C. *Stenoscript ABC Shorthand.* Washington: Stenoscript Shorthand Institute, Inc., 1964.

CARTER, THEODORE HAMPTON; FREEMAN, M. HERBERT; McGILL, E. C.; AND YERIAN, THEODORE. *Carter Briefhand.* Portland, Oregon: Allied Publishers, Inc., 1958.

FORKNER, HAMDEN L. *Forkner Alphabet Shorthand.* New York: Forkner Publishing Co., Inc., 1958.

GREGG, JOHN ROBERT; LESLIE, LOUIS A.; AND ZOUBEK, CHARLES E. *Gregg Shorthand, Diamond Jubilee Series, Text Edition.* New York: McGraw-Hill, 1963.

———. *Gregg Shorthand Dictionary, Diamond Jubilee Series, Text Edition.* New York: McGraw-Hill, 1963.

LESLIE, LOUIS A., AND ZOUBEK, CHARLES E. *Gregg Shorthand, Functional Method, Diamond Jubilee Series.* New York: McGraw-Hill, 1963.

LESLIE, LOUIS A.; ZOUBEK, CHARLES E.; AND HOSLER, RUSSELL J. *Gregg Shorthand for Colleges, Diamond Jubilee Series, Volume I.* New York: McGraw-Hill, 1965.

LESLIE, LOUIS A.; ZOUBEK, CHARLES E.; AND BOER, HENRY J. *Gregg Shorthand I: A Gregg Text-Kit in Continuing Edu-*

cation, Diamond Jubilee Edition. New York: McGraw-Hill, 1965.

——. *Gregg Shorthand II: A Gregg Text-Kit in Continuing Education, Diamond Jubilee Edition.* New York: McGraw-Hill, 1965.

New Basic Course in Pitman Shorthand. New York: Pitman, 1961.

Workbooks, teachers manuals and keys, methods books, wall charts, corrective slides, and dictation books, records, and tapes and may be obtained from the publishers of the basic text for most of the listed items. In addition, theory and dictation records may be obtained from Dictation Disc Company, 170 Broadway, New York. Film strips for the Skill-Builder Controlled Reader may be obtained from Educational Developmental Laboratories, Huntington, N.Y.

BEGINNING DICTATION (Shorthand II)

Basic Job Skill for Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily Total: 90 hours

Description and Teaching Suggestions

Emphasis is placed on the review of the principles of the symbolic or alphabetic system studied in Shorthand Principles and on the development of the ability to write shorthand fluently. Skill development is encouraged by means of graduated speed dictation of familiar copy. The ability to construct new shorthand outlines is developed through controlled dictation of unfamiliar material. English fundamentals and punctuation are reviewed as they apply to the dictation-transcription process. Transcription skill is developed through oral and typescript transcription of text plates, homework notes, and dictation notes. The supervised dictation laboratory enables students to build skills at individual rates.

Writing endurance at controlled rates is achieved by building up a speed reserve. The teacher may wish to use a one-minute, speed-forcing plan in which the first "take" is dictated at the average speed the class can take, followed by a series of one-minute periods of ten-word increases at speeds which do not exceed desired goal by more than 20 words.

Previews should be provided throughout the entire speed-building program. Use of dictation records and tapes may help trainees progress more rapidly at individual rates. When trainees are taking mechanical dictation, shorthand dictionaries should be available to check outlines about which they have doubt.

Preparation for typewritten transcription begins as the student progresses from text-plate transcription to transcribing his own dictation notes. Continued emphasis should be placed on recall and repetition of previously learned or newly added words and phrases.

Standards of Achievement

1. Transcribe, with at least 95 percent accuracy, new material dictated at:
   a. 60 to 80 wpm for three minutes or,
   b. 50 to 70 wpm for five minutes.
2. Transcribe, within 30 minutes, two mailable letters of 120 words each, exclusive of inside address, date, and closing.
3. Correct spelling, vocabulary, proofreading, punctuation, and grammar.

Prerequisites for Study of Beginning Dictation

Fundamentals of Typing.

Shorthand Principles.

Demonstrated proficiencies equivalent to standards of achievements for the above units are acceptable.

Topic Outline

I. Review of Basic Elements of Shorthand
II. Development of Speed and Accuracy
III. Spelling
IV. Vocabulary
V. Punctuation

TOPIC I. REVIEW OF BASIC ELEMENTS OF SHORTHAND

A. Abbreviated alphabetic systems necessitate a review of:
   1. Rules for formation of word abbreviations
   2. Rules for brief words and phrases
B. Symbolic systems necessitate a review of:
   1. Principles of joining
   2. Word beginnings and endings
   3. Omission of sounds and letters
   4. Construction of phrases
   5. Brief forms and brief form derivatives

TOPIC II. DEVELOPMENT OF SPEED AND ACCURACY

- A. Reading:
  - 1. Text plates
  - 2. Homework notes
  - 3. Dictation notes
- B. Extension of shorthand theory:
  - 1. New outlines
  - 2. New phrases
  - 3. Special abbreviating devices
  - 4. Brief form derivatives
- C. Dictation:
  - 1. Familiar previewed material
  - 2. Unfamiliar previewed material
- D. Transcription:
  - 1. Oral
  - 2. Typewritten—
    - a. Text plates
    - b. Homework notes
    - c. Dictation notes
  - 3. Proofreading

TOPIC III. SPELLING

- A. Review of basic spelling rules
- B. Common office terminology

TOPIC IV. VOCABULARY

- A. Words taken from the context of dictation
- B. Common office terminology

TOPIC V. PUNCTUATION

- A. Apostrophe
- B. Brace and brackets
- C. Colon
- D. Comma
- E. Dash
- F. Ellipses
- G. Exclamation point
- H. Hyphen
- I. Parentheses
- J. Period
- K. Question mark
- L. Quotation marks
- M. Semicolon

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Some of the books listed under Shorthand Principles are applicable to this unit. Additional materials are listed in Appendix D.

BOWMAN, W. B., AND OLIVERIO, MARY ELLEN. *Shorthand Dictation Studies, Simplified, 3rd ed.* Cincinnati: South-Western, 1961. Manual.

———. *Shorthand Dictation Studies, Jubilee, 3rd ed.* Cincinnati: South-Western, 1966. Manual.

GILSON, GOODWIN W. *Dictation Patterns.* New York: Pitman, 1961.

GREGG, JOHN ROBERT; LESLIE, LOUIS A.; AND ZOUBEK, CHARLES E. *Most-used Words and Phrases, Diamond Jubilee Series.* New York: McGraw-Hill, 1963.

LAMB, MARION M. *Word Studies, 5th ed.* Cincinnati: South-Western, 1963. Workbook, Achievement Tests and Manual.

LESLIE, LOUIS A. *20,000 Words, 5th ed.* New York: McGraw-Hill, 1965.

LESLIE, LOUIS A., AND ZOUBEK, CHARLES E. *Dictation for Transcription, Diamond Jubilee Series.* New York: McGraw-Hill, 1963.

LESLIE, LOUIS A.; ZOUBEK, CHARLES E.; AND HOSLER, RUSSELL J. *Gregg Shorthand for Colleges, Diamond Jubilee Series, Volume II.* New York: McGraw-Hill, 1965.

LESLIE, LOUIS A.; ZOUBEK, CHARLES E.; AND STRONY, MADELINE A. *Gregg Dictation, Diamond Jubilee Series.* New York: McGraw-Hill, 1963.

Modern Business Dictation, Shorthand Edition. New York: Pitman, 1954.

SCHACHTER, NORMAN. *English the Easy Way, 2nd ed.* Cincinnati: South-Western, 1961. Achievement Tests and Manual.

ZOUBEK, CHARLES E. *Speed Dictation with Previews in Gregg Shorthand, Diamond Jubilee Series.* New York: McGraw-Hill, 1963.

Workbooks, teacher manuals and keys, methods books, wall charts, corrective slides, and dictation books, records, and tapes may be obtained from the publishers of the basic texts. In addition, theory and dictation records may be obtained from Dictation Disc Co., 170 Broadway, New York, N.Y. Film strips for the Skill-Builder Controlled Reader may be obtained from Educational Developmental Laboratories, Huntington, N.Y.

INTRODUCTION TO TRANSCRIPTION (Shorthand III)

Basic Job Skill for Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily Total: 90 hours

Description and Teaching Suggestions

Considerable time is spent in strengthening previously learned shorthand, typewriting, and English skills to enable the trainee to produce mailable transcripts. Trainees transcribe from text plates as well as from personal notes. Stress is placed upon developing the ability to take dictation at increasingly higher speeds. The supervised dictation-transcription laboratory provides opportunity for the development of greater dictation and transcription skill.

Pre-transcription training started in previous shorthand and typing units, with the emphasis being given to spelling, vocabulary, punctuation, rapid reading of personal notes, and the development of touch typewriting techniques. All of these skills are now integrated and developed to achieve the end goal of shorthand—the mailable transcript. The transcription process consists of practice in transcribing from text plates, homework notes, previewed familiar dictation, and new-matter dictation which has been previewed for shorthand and transcription difficulties.

Laboratory time may be allocated so that certain days are reserved for dictation practice, while others are used for uninterrupted transcription.

Proofreading drills, in addition to the emphasis on careful proofreading of all transcripts, should make trainees aware of the importance of transcribing for sense as well as for typographical correctness.

The teacher may supplement basic instructional materials with the transcription exercises provided in various shorthand periodicals. Additionally, practice should be given for civil service examinations, since Shorthand III may be a terminal unit for some trainees.

Standards of Achievement

1. Transcribe, with at least 95 percent accuracy, new material dictated at:
   a. 80 to 100 wpm for three minutes, or
   b. 70 to 90 wpm for five minutes.
2. Transcribe at the rate of 21 to 30 wpm, with fewer than five uncorrected errors, new material dictated at 50 wpm for three minutes.
3. Transcribe in 10 minutes, one mailable dictated letter of 120 words, with carbon copy and addressed envelope.

Prerequisites for Study of Introduction to Transcription

Production Typing I.

Beginning Dictation.

Demonstrated proficiencies equivalent to standards of achievement for the above units are acceptable.

Topic Outline

I. Pre-test for Dictation and Transcription Rates
II. Reinforcement of Basic Elements of Shorthand
III. Further Development of Speed and Accuracy in Taking Dictation
IV. Further Development of Speed and Accuracy in Transcribing
V. Review of Secretarial Reference Materials

TOPIC I. PRE-TEST FOR DICTATION AND TRANSCRIPTION RATES

TOPIC II. REINFORCEMENT OF BASIC ELEMENTS OF SHORTHAND

A. Theory review for greater refinement in:
   1. Word beginnings and endings
   2. Principles of joining
   3. Omission of sounds and letters
   4. Phrasing
   5. Brief forms and brief form derivatives
   6. Geographical names
B. Further refinement of punctuation
C. Review use of dictation tools

TOPIC III. FURTHER DEVELOPMENT OF SPEED AND ACCURACY IN TAKING DICTATION

A. Familiar material with previews
B. Unfamiliar material with previews
C. Creation of shortcuts in the process of dictation
D. Frequent phrases
E. Extension of vocabulary

TOPIC IV. FURTHER DEVELOPMENT OF SPEED AND ACCURACY IN TRANSCRIBING

A. Diagnostic and corrective typewriting drills
B. Diagnostic and corrective spelling exercises
C. Transcribing activities:
   1. Text plates
   2. Student's notes
D. Error correction:
   1. Partial erasing
   2. Allowable strikeovers—e.g., e over c
   3. Use of commercially marketed correction tapes and fluids
E. Intuitive placement of:
   1. Letters
   2. Manuscripts
   3. Various types of business communications
F. Transcription with carbons:
   1. Single
   2. Multiple
   3. Pre-assembled carbon packs
G. Special transcription drills:
   1. Dates

    2. Figures
    3. Addresses
    4. Word substitutions
- H. Proofreading
- I. Letter styles
- J. Letter format determined by style of letterhead

TOPIC V. REVIEW OF SECRETARIAL REFERENCE MATERIALS

- A. Office manuals, handbooks, guides, maps, and catalogs
- B. Dictionaries
- C. Atlas
- D. Almanac
- E. Thesaurus
- F. Secretarial handbooks

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Some of the books listed under Shorthand Principles and Beginning Dictation may be applicable to this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L.; MEEHAN, JAMES R.; AND OLIVERIO, MARY ELLEN. *Secretarial Office Practice, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

BALSLEY, IROL W., AND ROBINSON, JERRY W. *Integrated Secretarial Studies, Simplified.* Cincinnati: South-Western, 1963. Workbook and Manual.

———. *Integrated Secretarial Studies, Jubilee Edition.* Cincinnati: South-Western, 1964. Workbook and Manual.

BALSLEY, IROL W., AND WANOUS, S. J. *Shorthand Transcription Studies, Jubilee Edition.* Cincinnati: South-Western, 1967. Manual.

BEAMER, ESTHER KAHN; HANNA, J. MARSHALL; AND POPHAM, ESTELLE L. *Effective Secretarial Practices, 4th ed.* Cincinati: South-Western, 1962.

DORIS, LILLIAN, AND MILLER, BESSE MAY. *Complete Secretary's Handbook, rev. ed.* Englewood Cliffs, N. J.: Prentice-Hall, 1960.

GAVIN, RUTH, AND HUTCHINSON, LOIS. *Reference Manual for Stenographers and Typists, 3rd ed.* New York: McGraw-Hill, 1961.

GREGG, JOHN R.; BLANCHARD, CLYDE; BALDWIN, WOODROW; AND POPHAM, ESTELLE L. *Gregg Speed Building for Colleges, Simplified, 3rd ed.* New York: McGraw-Hill, 1966.

———. *Gregg Speed Building for Colleges, Diamond Jubilee Series.* New York: McGraw-Hill, 1966.

HOUSE, CLIFFORD R., AND SKUROW, SAMUEL. *Typewriting Style Manual.* Cincinnati: South-Western, 1963.

HUMPHREY, KATHERINE; LAMBERT, ALLIE D.; AND NEWHOUSE, HOWARD L. *Timed Writings for Typing and Transcribing, Diamond Jubilee Series.* New York: McGraw-Hill, 1965.

LARSEN, LENNA A., AND KOEBELE, APOLLONIA M. *Reference Manual for Office Employees, 4th ed.* Cincinnati: South-Western, 1959.

LESLIE, LOUIS A. *20,000 Words, 5th ed.* New York: McGraw-Hill, 1965.

LESLIE, LOUIS A., AND ZOUBEK, CHARLES E. *Gregg Transcription, Diamond Jubilee Series.* New York: McGraw-Hill, 1964.

———. *Dictation for Transcription, Diamond Jubilee Series.* New York: McGraw-Hill, 1963. Teacher's book.

———. *Transcription Dictation.* New York: McGraw-Hill, 1956. Teacher's book.

———. *Graded Transcribing Tests, Diamond Jubilee Series.* New York: McGraw-Hill, 1964.

SIGNEY, EDITH C., and MCDONNELL, BERNARD J. *Introduction to Transcription.* New York: Pitman, 1955.

SILVERTHORN, J. E. *Word Division Manual.* Cincinnati: South-Western, 1958.

Workbooks, teacher manuals and keys, methods books, wall charts, corrective slides, and dictation books, records, and tapes may be obtained from the publishers of the basic texts for most of the listed items. In addition, theory and dictation records may be obtained from Dictation Disc Co., 170 Broadway, New York, N.Y. Film strips for the Skill-Builder Controlled Reader may be obtained from Educational Developmental Laboratories, Huntington, N.Y.

SPEED DICTATION AND TRANSCRIPTION (Shorthand IV)

Basic Job Skill for Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily Total: 90 hours

Description and Teaching Suggestions

Improved overall secretarial efficiency is achieved by developing the trainee's capacity to take dictation at higher rates, to transcribe with greater speed, accuracy, and understanding, and to handle related office situations. Attention is given to refining the business vocabulary and developing occupational sophistication. The supervised dictation-transcription laboratory allows for progress at individual rates.

The teacher should try to develop the trainee's ability to respond automatically during the dictation and transcription process. To develop control, many short, intensive speed drills should be followed by accuracy drills. To develop the ability to construct new words under time pressure, a principle should be reviewed, and then a series of words containing the principle should be dictated. The teacher may use Blanchard's Pyramid Plan for building speed. The teacher may devote some time to the improvement of writing habits. Emphasis should be placed on fluent outlines, getaway strokes, importance of proportion of outlines, and relative spacing of outlines. Where necessary, remedial work should be provided.

The trainee should be given office-style dictation with dictated deletions and revisions, indicating letters to be transcribed first by means of red pencil or paper clips. The trainee should be asked to transcribe cold notes and to correct obvious dictation errors, such as an incorrect date, or an obviously misused or incorrect word. A mailable letter standard is enforced. All transcripts should be proofread before being removed from the typewriter. When being submitted to the teacher, originals, together with envelopes, should be arranged as they would be for signature of an employer.

Standards of Achievement

1. Transcribe, with at least 95 percent accuracy, new material dictated at:
    a. 100 to 140 wpm for three minutes, or
    b. 80 to 120 wpm for five minutes.
2. Transcribe, at the rate of 25 to 35 wpm, with fewer than five uncorrected errors, new material dictated at 60 wpm for three minutes.
3. Transcribe in 30 minutes, three letters of 125 to 150 words each in body of letter, or
4. Transcribe in 5 to 8 minutes, one letter of 120 words, together with envelope and carbon copies.

Prerequisites for the Study of Speed Dictation and Transcription

Introduction to Transcription.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Refining of and Building on Basic Shorthand Skills
II. Further Development of Speed and Accuracy in Taking Dictation
III. Further Refinement of Transcription
IV. Office-Style Dictation
V. Review of Secretarial References

TOPIC I. REFINING OF AND BUILDING ON BASIC SHORTHAND SKILLS

TOPIC II. FURTHER DEVELOPMENT OF SPEED AND ACCURACY IN TAKING DICTATION

A. Familiar material (previews when needed)
B. Unfamiliar material with previews
C. Unfamiliar material without previews
D. Phrasing
E. Special abbreviations
F. Encouragement of individual shortcuts during dictation
G. Extending scope of vocabulary

TOPIC III. FURTHER REFINEMENT OF TRANSCRIPTION

A. Transcription activities:
    1. Text plates
    2. Student's notes
B. Diagnostic, corrective, and developmental typewriting drills
C. Letter style review
D. Judgment in placement of letters
E. Transcription of mansucripts and other office communications
F. Preparation of single and multiple carbons
G. Transcription to stencils, masters, and other pre-duplication processes
H. Transcription of dates
I. Transcription of figures
J. Transcription of addresses
K. Proper forms of address
L. Error correction
M. Spelling
N. Punctuation
O. Transcription shortcuts:
    1. Use of time-saving features on typewriter—
        a. Automatic repeat keys
        b. Partial carriage return
    2. Chain feeding of envelopes
    3. Maintaining up-to-date mailing lists
    4. Use of well-designed office forms
    5. Arrangement of materials for efficient work flow

TOPIC IV. OFFICE-STYLE DICTATION

TOPIC V. REVIEW OF SECRETARIAL REFERENCES

A. Office manuals, handbooks, guides, maps, and catalogs

B. Dictionary
C. Atlas
D. Almanac
E. Thesaurus
F. Secretarial handbooks

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select traineee and teacher materials for use in this unit. Many of the books listed under Shorthand Principles, Beginning Dictation, and Introduction to Transcription may be applicable to this unit. Additional materials are listed in Appendix D.

GAVIN, RUTH, AND HUTCHINSON, LOIS IRENE. *Reference Manual for Stenographers and Typists, 3rd ed.* New York: McGraw-Hill, 1961.

GREGG, JOHN ROBERT; LESLIE, LOUIS A.; AND ZOUBEK, CHARLES E. *Gregg Speed Building, Diamond Jubilee Series.* New York: McGraw-Hill, 1964.

HUTCHINSON, LOIS IRENE. *Standard Handbook for Secretaries, 7th ed.* New York: McGraw-Hill, 1956.

PLACE, IRENE, AND HICKS, CHARLES B. *College Secretarial Procedures, 3rd ed.* New York: McGraw-Hill, 1956.

ZOUBEK, CHARLES E. *Speed Dictation with Previews in Gregg Shorthand, Diamond Jubilee Series.* New York: McGraw-Hill, 1963. Teacher's book.

Workbooks, teacher manuals and keys, methods books, wall charts, corrective slides, and dictation books, records, and tapes may be obtained from the publishers of the basic texts for most of the listed items. In addition, theory and dictation records may be obtained from Dictation Disc Co., 170 Broadway, New York, N.Y.

ADVANCED SPEED DICTATION AND TRANSCRIPTION (Shorthand V)

Basic Job Skill for Legal Stenographers and Secretaries, Court Reporters, and Executive Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily — Total: 90 hours

Description and Teaching Suggestions

This unit offers each trainee an opportunity to develop shorthand skill to levels required for a particular career objective. High-speed dictation is provided. Continued emphasis is made for accuracy and greater speed in dictation and transcription. Provision is made for specialized dictation in such fields as law, medicine, and government, according to the needs and interests of trainees. The supervised dictation-transcription laboratory allows for progress at individual rates. Completion of this course should enable the trainee to handle his career position competently and should also provide a foundation for positions requiring greater stenographic skills.

Because skill is developmental in nature, the teacher should review suggestions for teaching each preceding course. At this level of instruction, it is especially important to maintain a high degree of motivation. Because the work calls for intensive practice, the teacher should vary the drills. Practice should always have purpose. The trainee should be told why he is doing a particular drill and how the drill will help him improve his skill. Transcription problems should be more complex. Correctness of work should be expected. The trainee should know how to find information in reference books.

Where trainees choose to prepare for specific fields, they can increase their vocabularies by reading current books and magazines relating to their field as well as specific house organs. In addition, the trainee might write to associations in his chosen field requesting glossaries of current terminology. Special abbreviations should be developed for frequently used terms. Special shorthand studies of terminology and form will be given in the legal, medical, scientific, and engineering areas.

Standards of Achievement

1. Transcribe, with at least 95 percent accuracy, new material dictated at:
   a. 120 to 160 wpm for three minutes, or
   b. 100 to 140 wpm for five minutes.
2. Transcribe at the rate of 35 to 45 wpm, with fewer than five uncorrected errors, new material dictated at 60 to 70 wpm.
3. Transcribe in 25 minutes, three average length letters (120 words).
4. Transcribe in 4 to 7 minutes, one letter of average length (120 words), together with addressed envelope and carbon copies.

Prerequisites for Study of Advanced Speed Dictation and Transcription

Speed Dictation and Transcription.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Reinforcement of Shorthand Principles
II. Further Development of Ability to Generalize in the Construction of Unfamiliar Outlines
III. Development of Greater Fluency in Reading and Writing Shorthand
IV. Development of Ability to Transcribe Rapidly and Accurately Any of the Many Types of Office Dictation
V. Increased Knowledge of Stenographic Procedures
VI. Extension of Business Vocabulary and Development of Specialized Vocabularies

TOPIC I. REINFORCEMENT OF SHORTHAND PRINCIPLES

A. Brief forms
B. Prefixes
C. Suffixes
D. Phrases
E. Geographical locations

TOPIC II. FURTHER DEVELOPMENT OF ABILITY TO GENERALIZE IN THE CONSTRUCTION OF UNFAMILIAR OUTLINES

TOPIC III. DEVELOPMENT OF GREATER FLUENCY IN READING AND WRITING SHORTHAND

A. Automatization of high-frequency outlines
B. Use of special abbreviating devices
C. Greater development of sustained writing at higher speeds.

TOPIC IV. DEVELOPMENT OF ABILITY TO TRANSCRIBE RAPIDLY AND ACCURATELY ANY OF THE MANY TYPES OF OFFICE DICTATION

A. Emphasis on structurally correct English
B. Emphasis on contextual congruity of transcripts
C. Proofreading
D. Office-style dictation

TOPIC V. INCREASED KNOWLEDGE OF STENOGRAPHIC PROCEDURES

A. Efficiency in handling materials
B. Use and care of supplies and equipment
C. Competent use of reference materials

TOPIC VI. EXTENSION OF BUSINESS VOCABULARY AND DEVELOPMENT OF SPECIALIZED VOCABULARIES

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Many of the books listed under the three previous manual shorthand units may be applicable to this unit. Additional materials are listed in Appendix D.

BLANCHARD, CLYDE, AND ZOUBEK, CHARLES E. *Most-Used Congressional Record Terms, 2nd ed.* New York: McGraw-Hill, 1952.

BREDOW, MIRIAM. *Medical Secretarial Procedures, 5th ed.* New York: McGraw-Hill, 1966.

LESLIE, LOUIS A., AND COFFIN, KENNETH B. *Handbook for the Legal Secretary, Text Edition.* New York: McGraw-Hill, 1958.

PRENTICE-HALL EDITORIAL STAFF. *The Handbook of Advanced Secretarial Techniques.* Englewood Cliffs, N. J.: Prentice-Hall, 1962.

ROOT, KATHLEEN, AND BYERS, EDWARD E. *Medical Typing Practice.* New York: McGraw-Hill, 1962.

———. *The Medical Secretary: Terminology and Transcription, 2nd ed.* New York: McGraw-Hill, 1960.

TURNER, BERNICE C. *Private Secretary's Manual, Revised by Prentice-Hall Editorial Staff.* Englewood Cliffs, N. J.: Prentice-Hall, 1963.

ZOUBEK, CHARLES E., AND RIFKIN, M. *Gregg Reporting Shortcuts: A Compilation of Shortcuts Used by Noted Gregg Reporters, 2nd ed.* New York: McGraw-Hill, 1959.

STENOGRAPHIC MACHINE OPERATION I

Basic Skill for Stenographers, Secretaries, Note Readers, and Shorthand Reporters Who Elect Machine Shorthand as a Foundation Skill

Hours Class: 1 hour daily; Practice time: 1 hour daily — Total: 270 hours
Accelerated Time Class: 2 hours daily; Practice time: 4 hours daily — Total: 160 hours

Description and Teaching Suggestions

This study unit stresses the initial phase in the teaching of machine-shorthand theory and keyboard operation. Also, the rules and application of beginning stenographic machine transcription are covered in this unit. Quick recognition of phonetic sounds, accuracy of notes, and rapid reading from phonetic notes must be developed as these are the bases for further speed progression. Transcription is required from the beginning of the theory phase of the unit until the time that the trainee masters the coordination of English, typewriting, and phonetic skills. The trainee is encouraged to force speed by the introduction of short-speed spurts on familiar matter. Longer periods of dictation are given to develop endurance.

A "Manual for Stenograph Teachers" containing step-by-step procedures is recommended for all teachers of machine shorthand. Utilization of long-playing records or tapes is suggested to provide uniform dictation speed, and drill from the Theory Manual, Workbook, and *Beginning Speed Practice, For Machine Shorthand, Text Series in Touch Shorthand, Book III,* will help the trainee to develop his speed more rapidly.

Completion of Stenographic Machine Operation I and the satisfactory completion of typing, secretarial procedures, language skills, personal development, and other orientation and skill units will enable the trainee to perform adequately the basic duties of a beginning machine stenographer.

Standards of Achievement

1. Take and transcribe, with at least 95 percent accuracy, two 5-minute "takes" dictated at speeds of 60 and 80 wpm. Transcription time for each set should be 20 to 25 minutes.
2. Transcribe in 20 to 30 minutes, two mailable business letters, with carbon copies and addressed envelopes, of 125 words each, dictated at speed of 60 and 80 wpm.

Prerequisites for Study of Stenographic Machine Operation I

Fundamentals of Typing.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Phonetics for Machine Shorthand
II. Four Sections of Machine Theory and Workbook
III. Handbook Presentation
IV. Beginning Speed Practice, For Machine Shorthand, Book III
V. Typewritten Transcription of Familiar Material
VI. Transcription of Unfamiliar Material
VII. Introduction to Intermediate Speed Practice, For Machine Shorthand, Book IV
VIII. Proficiency Tests

TOPIC I. PHONETICS FOR MACHINE SHORTHAND

A. Recognition of different sounds of words
B. Writing sounds
C. Transcribing practice of different sounds

TOPIC II. FOUR SECTIONS OF MACHINE THEORY AND WORKBOOK

A. Section I of machine theory:
  1. Introduction and development of stenographic keyboard, including consonant compounds and brief forms
  2. Vocabulary development
  3. Practice exercises in dictation and written transcription
B. Section II of machine theory:
  1. Two-stroke words
  2. Numerals
  3. Letter-by-letter spelling
  4. Machine theory rules
  5. Brief forms
  6. Practice exercises
C. Section III of machine theory:
  1. Advanced theory rules
  2. Punctuation
  3. Brief forms
  4. Practice exercises
D. Section IV of machine theory:
  1. Punctuation
  2. Numerals
  3. Proper names
  4. Simple letters
  5. Practice exercises for fluency

TOPIC III. HANDBOOK PRESENTATION

TOPIC IV. BEGINNING SPEED PRACTICE, FOR MACHINE SHORTHAND, BOOK III

A. Use of book for self-teaching
B. Graded timed letters
C. Theory review
D. Emphasis on practice exercises

TOPIC V. TYPEWRITTEN TRANSCRIPTION OF FAMILIAR MATERIAL

A. Selected dictation
B. Punctuation correction
C. "Demon" spelling

TOPIC VI. TRANSCRIPTION OF UNFAMILIAR MATERIAL

A. Selected dictation at trainee speed levels
B. Transcription practice

C. Instruction on erasures, notes accompanying transcripts, carbon copies

TOPIC VII. INTRODUCTION TO INTERMEDIATE SPEED PRACTICE, FOR MACHINE SHORTHAND, BOOK IV

(Drills and practice exercises.)

TOPIC VIII. PROFICIENCY TESTS

A. Five-minute standard tests administered when trainee is "ready"
B. Graduated intensity of material
C. Allowance for transcription time, erasures
D. Grading on spelling, letter placement, punctuation, and paragraphing (See Standards of Achievement for this unit)

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

LESLIE, LOUIS *A. 20,000 Words, Spelled and Divided.* New York: McGraw-Hill, 1965.

LESLIE, LOUIS A., AND ZOUBEK, CHARLES E. *Dictation for Transcription, Diamond Jubilee Series.* New York: McGraw-Hill, 1963. Teacher's book.

STENOGRAPHIC MACHINES, INC. *Handbook for Machine Shorthand.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Keyboard and Theory for Machine Shorthand.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Phonetics Workbook for Machine Shorthand.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Beginning Speed Practice, For Machine Shorthand, Text Series in Touch Shorthand, Book III.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Intermediate Speed Practice, For Machine Shorthand, Text Series in Touch Shorthand, Book IV.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Proficiency Tests for Machine Shorthand.* Skokie, Ill.: Stenographic Machines, Inc., 1960.

———. *Supplementary Dictation Material.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Volume I, 80–160 Words per Minute.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

ZOUBEK, CHARLES E. *Progressive Dictation with Previews.* New York: McGraw-Hill, 1956.

STENOGRAPHIC MACHINE OPERATION II

Basic Skill for Stenographers, Secretaries, Shorthand Reporters, and Note Readers Electing Machine Shorthand as a Foundation Skill

Hours Class: 1 hour daily; Practice time: 2 hours daily Total: 135 hours

Accelerated Time Class: 2 hours daily; Practice time: 4 hours daily Total: 125 hours

Description and Teaching Suggestions

The objectives of this unit are development of fluent and accurate writing and the transcription of material dictated at speeds from 100 to 140 wpm. It is suggested that *Interemdiate Speed Practice, For Machine Shorthand, Text Series in Touch Shorthand, Book IV* be used by the teacher during this stage of training. The trainee is introduced to dictation from newspaper articles and financial reports, to office-style dictation, to industrial terminology, etc. The trainee should be exposed to legal and medical terminology, dictated at a slow speed, to provide familiarity with the basic terms. Stress is placed on facility in transcription of unfamiliar matter. Spelling, punctuation, grammar, and vocabulary development are foundations for this unit.

It is suggested that dictation tapes or records be used to maintain uniform speed in dictation exercises. In this unit, constant dictation and reading back are essential to producing correct transcripts. Trainees who meet the standards of achievement for this unit should be able to qualify for beginning work in most of the jobs in the occupational group, provided other required general and specialized office education units are also completed.

Standards of Achievement

1. Take and transcribe, with at least 95 percent accuracy, two 5-minute "takes" dictated at a speed of 120 wpm. Transcription rate should be between 30 to 35 wpm or better.
2. Transcribe four to six mailable letters, with carbon copies and addressed envelopes, of 125 words each, dictated at a speed of 120 wpm. Transcription rate should be between 30 and 35 wpm.

Prerequisites for Study of Stenographic Machine Operation II

Stenographic Machine Operation I.

Demonstrated proficiencies equivalent to standards of achievement for the above are acceptable.

Topic Outline

I. Intermediate Speed Practice, For Machine Shorthand, Book IV
II. Proficiency Tests
III. Development of Speed in Transcription
IV. Basic Terms of Medical and Legal Terminology

TOPIC I. INTERMEDIATE SPEED PRACTICE, FOR MACHINE SHORTHAND, BOOK IV

A. Proper names and numbers
B. Repertoire letters
C. Punctuation exercises
D. Short systems for note taking
E. Facility letters
F. Drills

TOPIC II. PROFICIENCY TESTS

NOTE: Graduated speed tests from 60 wpm upwards to 120 wpm are to be given to trainees as they progress in unit.

TOPIC III. DEVELOPMENT OF SPEED IN TRANSCRIPTION

A. Reading back
B. Typing from notes

TOPIC IV. BASIC TERMS OF MEDICAL AND LEGAL TERMINOLOGY

NOTE: Dictation of subject matter in these areas should be at slow speeds. Trainees should be encouraged to expand their vocabularies in each area to become familiar with sound and spelling of technical words.

Texts and Other Teaching Materials

In addition to the materials listed under Stenographic Machine Operation I, teachers may select appropriate materials from those suggested below:

GAVIN, RUTH E., AND HUTCHINSON, LILLIAN. *Reference Manual for Stenographers and Typists, 3rd ed.* New York: McGraw-Hill, 1961.

LAMB, MARION M. *Word Studies, 5th ed.* Cincinnati: South-Western, 1963. Workbook, Achievement Tests, and Manual.

LARSEN, LENNA A., AND KOEBELE, APOLLONIA M. *Reference Manual for Office Employees, 4th ed.* Cincinnati: South-Western, 1959.

LESLIE, LOUIS A., AND COFFIN, KENNETH B. *Handbook for the Legal Secretary.* New York: McGraw-Hill, 1958.

LESLIE, LOUIS A., AND ZOUBEK, CHARLES E. *Dictation for Transcription, Diamond Jubilee Series.* New York: McGraw-Hill, 1963. Teacher's book.

ROOT, KATHLEEN B., AND BYERS, EDWARD E. *The Medical Secretary: Terminology and Transcription.* New York: McGraw-Hill, 1960.

SILVERTHORN, J. E. *Word Division Manual.* Cincinnati: South-Western, 1958.

STENOGRAPHIC MACHINE OPERATION III

Basic Skill for Legal Stenographers and Secretaries, Shorthand Reporters, Note Readers and Executive Secretaries Electing Machine Shorthand as a Foundation Skill. Elective for Public Stenographers Using Machine Shorthand.

Hours Class: 1 hour daily; Practice time: 3 hours daily — Total: 240 hours

Accelerated Time Class: 2 hours daily; Practice time: 4 hours daily — Total: 150 hours

Description and Teaching Suggestions

This unit is designed to advance the trainee beyond the 120-wpm stage of development. Material dictated is more difficult and of longer duration. Preparation time to master material is lengthened. Reading of notes is stressed. Diligent and consistent practice is required to reach achievement standards. Transcription time is shortened.

The trainee is introduced to different terminologies, including medical, legal, and scientific nomenclature. Initial phases of testimony and jury-charge dictation are included in preparation for next unit of study for shorthand reporters. Teaching suggestions will be found in appropriate manuals. It is suggested that audio tapes and records with appropriate subject material be used to maintain uniform speeds of dictation. Trainees achieving standards of the unit may qualify as note readers helping shorthand court reporters. Legal stenographers may elect to pursue unit studies for 90 hours or to completion. Achievement level of these trainees should be noted on their Record of Completion.

Standards of Achievement

1. Take and transcribe, with at least 97 percent accuracy, four 5-minute "takes" dictated at speeds of 140 to 160 wpm. Transcription rate should be at 40 wpm or better.
2. Transcribe ten mailable letters, with carbon copies and addressed envelopes, of 150 words each, dictated at speeds of 140 to 160 wpm. Transcription rate should be 40 wpm or better.

Prerequisites for Study of Stenographic Machine Operation III

Stenographic Machine Operation II.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Advanced Speed Practice, For Machine Shorthand, Book V
II. Introduction to Congressional Dictation
III. Legal and Medical Dictation
IV. Introduction to Scientific Dictation
V. Introduction to Testimony Dictation
VI. Introduction to Jury Charge Dictation

TOPIC I. ADVANCED SPEED PRACTICE, FOR MACHINE SHORTHAND, BOOK V

A. Repertoire and facility letters
B. Numbers and proper names
C. Punctuation and abbreviations
D. Endings
E. Rules

TOPIC II. INTRODUCTION TO CONGRESSIONAL DICTATION

NOTE: Dictation should be given at increasing speeds from transcripts in the *Congressional Record* or other Congressional reports.

TOPIC III. LEGAL AND MEDICAL DICTATION

A. Terminology
B. Prefixes, roots, and suffixes
C. Dictation of medical reports and legal briefs
D. Reading back and transcription practice

NOTE: Teachers may refer to the legal and medical areas in the *Specialized Office Education Units* section of this guide for appropriate materials.

TOPIC IV. INTRODUCTION TO SCIENTIFIC DICTATION

A. Terminology from life and physical sciences
B. Prefixes, roots, and suffixes
C. Dictation of scientific and engineering reports, proposals, etc.
D. Transcription practice

NOTE: Teachers may refer to the scientific and engineering areas in the *Specialized Office Education Units* section of this guide for appropriate materials.

TOPIC V. INTRODUCTION TO TESTIMONY DICTATION

TOPIC VI. INTRODUCTION TO JURY CHARGE DICTATION

Texts and Other Teaching Materials

In addition to the materials listed under Stenographic Machine Operation II, teachers may select appropriate materials from those suggested below:

BREDOW, MIRIAM. *Medical Secretarial Procedures, 5th ed.* New York: McGraw-Hill, 1966.

Congressional Record. Washington, Superintendent of Documents, U.S. Government Printing Office.

KEILY, HELEN J., AND WALTERS, R. G. *How To Find and Apply for a Job, 2nd ed.* Cincinnati: South-Western, 1960.

STENOGRAPHIC MACHINES, INC. *Advanced Speed Practice, For Machine Shorthand, Text Series in Touch Shorthand, Book V.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Courtroom Testimony.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Jury Charge.* Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Proficiency Tests for Machine Shorthand.* Skokie, Ill.: Stenographic Machines, Inc., 1960.

Also suggested are various medical, legal, and scientific professional journals.

FUNDAMENTALS OF TYPING (Typing I)

Basic Skill for Stenographers and Secretaries

Hours Class: 2 hours daily — Total: 70 hours

Description and Teaching Suggestions

This unit introduces the trainee to touch-typing techniques and to correct operation of the manipulative parts of the typewriter. It includes orientation in the basic patterns of centering and arranging reports and letters. Supervised skill-development sessions are an integral part of the course. Teachers' manuals contain many helpful suggestions for skill improvement. In this introductory unit, concentration should be on mastery of the alphabetic keyboard by touch, and on speed and accuracy development, rather than on typing applications. A teacher may use other equivalent standards according to requirements of the sponsoring institution.

Standards of Achievement

Straight copy (syllable index—1.4)
3 minutes; 30 wpm/eco 1, *OR* 35 wpm /eco, 2, *OR* 40 wpm/eco 3, *OR* 45 wpm/eco 4.

"eco" is defined as the error cutoff, which is that error in the trainee's copy beyond which the trainee does not compute wpm. In the above standards, "30 wpm/eco 1" means that the trainee checks his copy to the first error and figures wpm to that point; "35 wpm/eco 2"—trainee checks copy to second error and figures wpm at that point; "40 wpm/eco 3"—trainee checks copy to third error and figures wpm at that point; "45 wpm/eco 4"—trainee checks copy to fourth error and figures wpm at that point. This definition is applicable to standards in other typing units of this guide.

Prerequisites for Study of Fundamentals of Typing

Trainee selection standards.

Topic Outline

I. Machine Fundamentals
II. Understanding Quality and Performance Standards
III. Typing Skill Development
IV. Introduction to Typing Applications

TOPIC I. MACHINE FUNDAMENTALS

A. Parts:
  1. Identification (as required)
  2. Use (as required)
B. Typist's maintenance procedures:
  1. Regular cleaning
  2. Regular servicing by trained serviceman
  3. Erasing (as required)
  4. Handling of movable parts (as required)
C. Manual and electric typewriters:
  1. Similarities (as needed)
  2. Differences (as needed)
D. Operation:
  1. Desk, chair, and copy adjustments
  2. Inserting papers
  3. Proper position—
    a. Hands
    b. Arms (elbows)
    c. Posture (feet, back, etc.)
  4. Stroking—
    a. Manual typewriter
    b. Electric typewriter
  5. Proper mind-set
  6. Techniques for relaxing

TOPIC II. UNDERSTANDING QUALITY AND PERFORMANCE STANDARDS

A. Speed and accuracy:
  1. Errors and error scores
  2. Information regarding erasures
B. Neatness:
  1. Format and layout
  2. Corrections
  3. Smudges and fingerspots
C. Language arts:
  1. Word usage
  2. Spelling
  3. Punctuation
  4. Figures
  5. Grammar

TOPIC III. TYPING SKILL DEVELOPMENT

A. Keyboard mastery:
  1. Alphabet
  2. Numbers (acquaintance level)
  3. Special characters (introduction)
B. Manipulation of machine parts (as required)
C. Speed, accuracy, and erasing
D. Areas of improvement:
  1. Concurrent development of speed and accuracy
  2. End-product quality
E. Individual differences:
  1. Individualization via selectivity in drill materials and practice patterns
  2. Error pattern analysis and remedial work

TOPIC IV. INTRODUCTION TO TYPING APPLICATIONS

A. Centering (horizontal, vertical)
B. Informal reports (main heading and body; no footnotes)
C. Envelopes (one style only)
D. Letters (one style only)
E. Tables (one style only, beginner's level)

Texts and Other Teaching Materials

From the suggested texts and materials listed below (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Some of the items listed are also applicable to more advanced typewriting units.

Additional materials are listed in Appendix D.

ALTHOLZ, GERTRUDE. *Modern Typewriting Practice, 3rd ed.* New York: Pitman, 1962.

CARTER, JUANITA E. *Teaching Tapes and Records for 20th Century Typewriting, 8th ed.* Cincinnati: South-Western, 1962.

CONNELLY, MARY, AND PORTER, LEONARD J. *Typing Speed Builders.* Englewood Cliffs, N. J.: Prentice-Hall, 1962.

GRUBBS, ROBERT L., AND WHITE, JAMES L. *Sustained Timed Writings, 2nd ed.* New York: McGraw-Hill, 1963.

HOUSE, CLIFFORD R., AND SKUROW, SAMUEL. *Typewriting Style Manual.* Cincinnati: South-Western, 1963.

LESSENBERRY, D. D.; CRAWFORD, T. JAMES; AND ERICKSON, LAWRENCE W. *20th Century Typewriting, 8th ed., Elementary Course.* Cincinnati: South-Western, 1962. Workbook, Achievement Tests, Teaching Tapes and Records, Manual and Placement Tests.

LLOYD, ALAN C.; ROWE, JOHN L.; AND WINGER, FRED E. *Typing Power Drills, 2nd ed.* New York: McGraw-Hill, 1965.

———. *Typing Skill Drives.* New York: McGraw-Hill, 1960.

———. *Gregg Typewriting for Colleges, 2nd ed., Basic.* New York: McGraw-Hill, 1964.

MACCLAIN, LENORE FENTON, AND DAME, J. FRANK. *Typewriting Techniques and Short Cuts, 3rd ed.* Cincinnati: South-Western, 1961.

MOUNT, DICK, AND HANSEN, KENNETH J. *Progressive Typewriting Speed Practice, 2nd ed.* New York: McGraw-Hill, 1961.

NELSON, ROGER H. *Accelerated Typing.* Salt Lake City: Business Education Publishers, Inc., 1959.

OLIVERIO, MARY ELLEN, AND PALMER, HAROLD O. *Graded Time Writings.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

ROWE, JOHN L., AND ETIER, FABORN. *Typewriting Drills for Speed and Accuracy, 2nd ed.* New York: McGraw-Hill, 1959.

ROWE, JOHN L.; LLOYD, ALAN C.; AND WINGER, FRED E. *Gregg Typing—191 Series, Book One, General Typing* and *Gregg Typing—191 Series.* New York: McGraw-Hill, 1962.

THOMPSON, DR. JAMES M. *101 Typewriting Timed Writings, 2nd ed.* Cincinnati: South-Western, 1961.

WANOUS, S. J., AND WANOUS, E. W. *Basic Typewriting Drills, 3rd ed.* Cincinnati: South-Western, 1958.

WINGER, FRED E.; ROWE, JOHN L.; AND LLOYD, ALAN C. *Gregg Typing I: A Gregg Text-Kit in Continuing Education.* New York: McGraw-Hill, 1965.

Correlated tapes and records, manuals, tests, and workbooks, not noted above, may also be available from publishers of the listed items.

PRODUCTION TYPING I (Typing II)

Basic Skill for Stenographers and Secretaries

Hours Class: 2 hours daily Total: 70 hours

Description and Teaching Suggestions

This unit continues supervised speed and accuracy development, integrated with the basic production of correspondence, reports, and simple tabulations. Class time can be divided into one hour daily for production typing and one hour daily for techniques refinement, keyboard mastery, and speed and accuracy development. A teacher may use other standards, equivalent to those suggested, according to his institution's requirements.

Standards of Achievement

1. Straight copy (syllable index—1.4): 5 minutes; 35 wpm/eco 1, *OR* 40 wpm/eco 2, *OR* 45 wpm/eco 3, *OR* 50 wpm/eco 4.
2. Produce double-spaced report copy, with main heading, from plain copy of approximately 200 words. If production word-counted, time should be 6 minutes; otherwise, 9 minutes.
3. Produce mailable business letter of approximately 150 words (no special lines, i.e., subject, attention, etc.), with envelope, from plain, unarranged copy. If production word-counted, time should be 7 minutes; otherwise, 10 minutes.

Prerequisites for Study of Production Typing I

Fundamentals of Typing.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Skill Refinement and Development
II. Typing Applications

TOPIC I. SKILL REFINEMENT AND DEVELOPMENT

- A. Concurrent development of greater speed with high accuracy
- B. Numbers and special characters, with special emphasis on numbers
- C. Areas for improvement:
  1. Techniques, including frequent analytical check-ups of each student

2. Somewhat greater speed with high accuracy
3. Numbers (emphasis) and special characters
4. Organization of work station (study of time and motions utilized in performing at the typewriter)
5. End-product quality

TOPIC II. TYPING APPLICATIONS

A. Business arrangements:
   1. Letters, envelopes
   2. Simple tabulations: 2 to 4 columns, main headings, no column headings
   3. Reports with 1 and 2 footnotes, 2 to 3 pages long
   4. Simple office records (beginner's level)

B. Proofreading:
   1. Methods and techniques:
   2. Proofreading for—
      a. Typing accuracy and layout
      b. Language arts: spelling, grammar, correct word usage, figures, etc.

Texts and Other Teaching Materials

Some of the texts and other teaching materials listed under Fundamentals of Typing may be applicable to this unit. The teacher may also wish to consider the following suggested texts and materials. Some of the items listed are also applicable to more advanced typewriting units. Additional materials are listed in Appendix D.

AGNEW, PETER L. *Typewriting Office Practice, 3rd ed.* Cincinnati: South-Western, 1960.

ANDERSON, RUTH L., AND PORTER, LEONARD J. *130 Basic Typing Jobs, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

BELL, MARY L. *Speed Typing, 3rd ed.* Cincinnati: South-Western, 1959.

BRENDEL, LEROY, AND NEAR, DORIS. *Spelling Drills and Exercises: Programmed for the Typewriter.* New York: McGraw-Hill, 1964.

FRIES, ALBERT C. *Timed Writings about Careers.* Cincinnati: South-Western, 1963.

FRIES, ALBERT C., AND NANASSY, LOUIS C. *Business Timed Writings.* Englewood Cliffs, N. J.: Prentice-Hall, 1960.

FRISCH, VERN A., AND SIVINSKI, JOAN. *Applied Office Typewriting, 2nd ed.* New York: McGraw-Hill, 1961.

LESSENBERRY, D. D.; CRAWFORD, T. JAMES; AND ERICKSON, LAWRENCE W. *20th Century Typewriting, Advanced Course, 8th ed.* Cincinnati: South-Western, 1962. Workbook, Achievement Tests, Placement Tests, and Manual.

LILES, PARKER; BRENDEL, LEROY; AND KRAUSE, RUTHETTA. *Typing Mailable Letters.* New York: McGraw-Hill, 1960.

LIQUORI, F. *Basic Typing Operations.* Cincinnati: South-Western, 1964.

LLOYD, ALAN C.; ROWE, JOHN L.; AND WINGER, FRED E. *Gregg Typewriting for Colleges, 2nd ed., Intensive.* New York: McGraw-Hill, 1964.

ROWE, JOHN L.; LLOYD, ALAN C.; AND WINGER, FRED. *Gregg Typing—191 Series, Book Two—Office Production Typing.* New York: McGraw-Hill, 1962.
Learning Guides and Working Papers for Book Two—Office Production Typing, Parts 1–6.
Learning Guides and Working Papers for Book Two—Office Production Typing, Parts 7–12.

PRODUCTION TYPING II (Typing III)

Basic Skill for Stenographers and Secretaries

Hours Class: 1 hour daily

Total: 40 hours

Description and Teaching Suggestions

This unit continues the further refinement and development of basic typing skills in addition to supervised, concentrated application of the typing skills to the production of practical business correspondence, forms, and reports. Attention is also given to selection of appropriate tools and materials.

Standards of Achievement

1. Straight copy (syllable index—1.5): 5 minutes; 40 wpm/eco 1, *OR* 45 wpm/eco 2, *OR* 50 wpm/eco 3, *OR* 55 wpm/eco 4.
2. Produce double-spaced report copy of approximately 300 words, with no footnotes, from corrected draft and from handwritten copy. If production word-counted, time should be 10 minutes; otherwise, 13 minutes.
3. Produce mailable business letter of approximately 150 words (no special lines, i.e., subject, reference, etc.), with envelope, from corrected draft and from handwritten copy. If production word-counted, time should be 8 minutes; otherwise, 11 minutes.

Prerequisites for Study of Production Typing II

Production Typing I.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Skill Refinement and Development
II. Improvement of Production Typing Skills

TOPIC I. SKILL REFINEMENT AND DEVELOPMENT

- A. Keyboard:
  1. Numbers
  2. Special characters (with emphasis on ", -)
- B. Proofreading:
  1. Typing accuracy and layout
  2. Language arts: spelling, grammar, correct word usage, figures, etc.
- C. Areas of improvement:
  1. Greater speed with high accuracy: straight copy, production jobs
  2. Organization of work station and source materials
  3. Proofreading
  4. End-product quality

TOPIC II. IMPROVEMENT OF PRODUCTION TYPING SKILLS

- A. Organization of work station:
  1. Desk, chair, typewriter adjustments
  2. How to choose appropriate materials and tools for tasks (carbon, ribbon, eraser, paper, etc.)
  3. Source materials from which typist will be working
- B. When and how to erase
- C. Proofreading
  1. Typing accuracy and layout
  2. Language arts
- D. Materials
  1. Correspondence
     - a. Letters (subject line, attention line, P.S., bcc, etc.), envelopes, multiple carbons
     - b. Interoffice memoranda carbons
  2. Reports
     - a. From draft copies, carbons
     - b. From handwritten copies, carbons
  3. Tabulations
     - a. 4 to 5 columns
     - b. Blocked and centered column headings
  4. Business forms and records
  5. Offset masters, stencils, spirit masters

Texts and Other Teaching Materials

Most of the texts and other teaching materials listed under Fundamentals of Typing and Production Typing I are also applicable to this unit. Additional materials are listed in Appendix D.

PRODUCTION TYPING III (Typing IV)

Basic Skill for Stenographers and Secretaries

Hours Class: 1 hour daily — Total: 40 hours

Description and Teaching Suggestions

This unit provides supervised and integrated practice on production projects that apply to and give experience in the preparation of more advanced tables, reports, correspondence, and forms.

Standards of Achievement

1. Straight copy (syllable index—1.5): 5 minutes; 45 wpm/eco 1, *OR* 50 wpm/eco 2, *OR* 55 wpm/eco 3, *OR* 60 wpm/eco 4.
2. Produce double-spaced report copy of approximately 400 words, with main heading and paragraph headings but with no footnotes, from corrected draft and from handwritten copy. If production word-counted, time should be 12 minutes; otherwise, 15 minutes.
3. Produce mailable business letter of approximately 150 words (no special lines), with one carbon and envelope, from corrected draft and from handwritten copy. If production word-counted, time should be 8 minutes; otherwise, 11 minutes.

Prerequisites for Study of Production Typing III

Production Typing II.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Improvement of Production Typing Skills
II. Production Practice Projects

TOPIC I. IMPROVEMENT OF PRODUCTION TYPING SKILLS

- A. Production typing:
  - 1. From corrected draft copies
  - 2. From handwritten copies
- B. Areas for improvement:
  - 1. Greater speed with high accuracy; straight copy, production jobs
  - 2. Organization of work station
  - 3. End-production quality
  - 4. Proofreading

TOPIC II. PRODUCTION PRACTICE PROJECTS

- A. Correspondence: letters, interoffice memos, reports
- B. Simple financial statements
- C. Tables (boxed, unboxed)
- D. Telegrams, labels, filecards, etc.
- E. Programs, outlines, and similar projects
- F. Statistical:
  - 1. Orders, invoices, similar business papers
  - 2. Compilations of facts and figures

Texts and Other Teaching Materials

Most of the texts and other teaching materials listed under previous typing units are also applicable to this unit. The teacher may also wish to give consideration to the suggested texts and materials listed below. Some of the items listed are applicable to the next unit. Additional materials are listed in Appendix D.

AGNEW, PETER L., AND ATKINSON, PHILIP. *Medical Office Practice*. Cincinnati: South-Western, 1966.

HUMPHREY, KATHERINE; LAMBERT, ALLIE DALE; AND NEWHOUSE, HOWARD L. *Timed Writings for Typing and Transcribing, Diamond Jubilee Series*. New York: McGraw-Hill, 1965.

LILES, PARKER; BRENDEL, LEROY A.; AND KRAUSE, RUTHETTA. *Typing Mailable Letters*. New York: McGraw-Hill, 1960.

MACCLAIN, LENORE FENTON, AND DAME, J. FRANK. *Typewriting Techniques and Short Cuts, 3rd ed.* Cincinnati: South-Western, 1961.

REIGEL, CHARLES, AND PERKINS, EDWARD. *Executive Typewriting*. New York: McGraw-Hill, 1966.

SANDRY, ESTHER. *Typewriting Office Practice Set*. New York: Pitman, 1961.

Correlated tapes and records, manuals, tests, and workbooks not noted above may also be available from publishers of the listed items.

ADVANCED TYPING AND PRODUCTION PROBLEMS (Typing V)

Basic Skill for Stenographers and Secretaries

Hours Class: 1 hour daily Total: 30 hours

Description and Teaching Suggestions

This unit provides additional practical problem-solving experience in the preparation of advanced forms of reports, correspondence, tables, and forms. Work in special fields should be limited, while concentration on the solution of typing problems should be stressed to improve the production rate in daily work situations. This is the final general skill unit before specialized typing units.

Standards of Achievement

1. Straight copy (syllable index–1.5): 5 minutes; 50 wpm/eco 1, *OR* 55 wpm/eco 2, *OR* 60 wpm/eco 3, *OR* 65 wpm/eco 4.
2. Produce mailable business letters of approximately 150 words and having simple display paragraph(s), with envelope and two carbons, from corrected draft and from handwritten copy. If production word-counted, time should be 8 minutes; otherwise, 11 minutes.
3. In 10 minutes, plan and type a tabular form consisting of four columns having short blocked column headings and a maximum of 15 lines with 5–15 horizontal characters per column.

Prerequisites for Study of Advanced Typing and Production Problems

Production Typing III.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Further Improvement of Production Typing Skills
II. Advanced Problem Solving

TOPIC I. FURTHER IMPROVEMENT OF PRODUCTION TYPING SKILLS

- A. Production typing from corrected draft and handwritten copies
- B. Areas for improvement:
  - 1. Increased production
  - 2. Organization of work station
  - 3. Proofreading
  - 4. End-product quality

TOPIC II. ADVANCED PROBLEM SOLVING

- A. Reports:
  - 1. Formal, informal (cover page, table of contents, appendices, tables, footnotes)
  - 2. Statistical
  - 3. Financial statements (2-page copy)
- B. Correspondence:
  - 1. Letters, including much display, statistical, and numerical data
  - 2. Interoffice memos, including much display, statistical, and numerical data
- C. Composition:
  - 1. Letters
  - 2. Interoffice memoranda
  - 3. Short reports
- D. Areas of special application (limited time):
  - 1. Legal
  - 2. Engineering
  - 3. Medical
  - 4. Publishing
  - 5. Other (possibly based on trainee's interest and end-of-training goals)

Texts and Other Teaching Materials

Many of the texts listed under previous production typewriting units may be applicable to this unit. The teacher may also wish to give consideration to the suggested texts and materials listed below. Additional materials are listed in Appendix D.

LARSEN, LENNA A., AND KOEBELE, APOLLONIA M. *Reference Manual for Office Employees, 4th ed.* Cincinnati: South-Western, 1959.

SASS, ESTHER. *Advanced Typing Projects.* New York: Pitman, 1961.

STUART, ESTA ROSS; PAYNE, VERNON V.; AND ANDERSON, RUTH I. *Complete College Typing.* Englewood Cliffs, N. J.: Prentice-Hall, 1959.

SECRETARIAL ORIENTATION

Environmental and Functional Knowledge Unit for Secretaries and Stenographers

Hours Class: 1 hour daily

Total: 40 hours

Description and Teaching Suggestions

This unit will help trainees to understand the environment in which most of them will work. Starting with a quick review of business purposes and organization, the unit moves from an explanation of work done in various kinds of offices to the personnel office function. The selection process is highlighted by indicating what employers expect of stenographers and secretaries in terms of appearance, skills, and deportment. Succeeding topics are devoted to office and social behavior training, both in terms of the social manners a secretary (or, in certain cases, stenographer) is expected to exhibit in setting good office tone and adding dignity and prestige to the office. Practice in developing good interpersonal relations with classmates is a must in this unit. The importance of interpersonal relations should be stressed since it is most often a key factor in holding and advancing in a position and can often negate technical skills. Practice should be given in good organization of the work station. Office projects should be organized to allow multiple participation and cooperation.

Trainee attitudes should be explored in depth. The trainee should be provided sufficient stimuli to develop motivation for success. Carefully planned and supervised visits to business offices should be part of the unit's activities. Planning should include brief talks by personnel of different departments at the visited business offices. It might also be helpful to have a stenographer or secretary at one of these offices explain his job. *Role playing* should be used extensively in the areas of courtesy, interviewing, poise, business and social etiquette, and interpersonal relations. Films, filmstrips, lectures, reading assignments, and group discussions should supplement role playing. Practice in work station organization should be given. Self-analysis techniques should be encouraged. A helpful following unit for female trainees is Personal Development.

Trainees should be evaluated by objective tests of factual knowledge and by observations of the teacher regarding the trainee's interest and progress in etiquette and interpersonal relations.

Standards of Achievement

1. Dress appropriately for business.
2. Exhibit acceptable behavior for stenographers and secretaries in interpersonal relations.
3. Demonstrate acceptable office and social etiquette.
4. Organize an efficient stenographic or secretarial work station.

Prerequisites for Study of Secretarial Orientation

General Office Education units suggested for concurrent study are Fundamentals of Typing and Shorthand Principles or Stenographic Machine Operation I.

Topic Outline

I. Brief Review of Modern Business Enterprise
II. Types of Offices
III. Opportunities for Office Workers
IV. The Personnel Office
V. What Business Expects of Office Workers
VI. Office and Social Etiquette
VII. Interpersonal Relations

TOPIC I. BRIEF REVIEW OF MODERN BUSINESS ENTERPRISE

A. Organization for modern business:
   1. Proprietorship
   2. Partnership
   3. Corporation
B. Purposes for being in business:
   1. To provide a needed service
   2. To produce goods in demand
   3. To make a profit

TOPIC II. TYPES OF OFFICES

A. Financial (banking, brokerage)
B. Sales, advertising, and production
C. General administrative
D. Staff offices (including personnel, public relations, public information)
E. Professional offices:
   1. Legal
   2. Medical and hospital
   3. Engineering and scientific
   4. Others
F. Government

TOPIC III. OPPORTUNITIES FOR OFFICE WORKERS

A. Promotional practices
B. Training and opportunities for advanced study offered in business and in the community

TOPIC IV. THE PERSONNEL OFFICE

A. Basic functions of the personnel office:
   1. Identification of workers needed
   2. Identifying requirements of jobs to be done
   3. Recruitment
   4. Selection of workers
   5. Evaluation of workers
   6. Promotion of workers
B. Methods of selecting office personnel:
   1. Types of office personnel needed
   2. Evaluation of prospective employees—
      a. Interview
      b. Tests
      c. References
C. The relationship of the personnel office to office employees

TOPIC V. WHAT BUSINESS EXPECTS OF OFFICE WORKERS

A. General expectations:
   1. Speech
   2. Manner
   3. Grooming
B. Appropriate attire for work (see also Personal Development unit):
   1. Dress
   2. Shoes
   3. Accessories
C. Desirable work attitudes and habits:
   1. Punctuality
   2. Loyalty
   3. Courtesy
   4. Initiative
   5. Responsibility
D. Job skills:
   1. Standards of accomplishment on various job tasks
   2. The assessment of skills by the employer

TOPIC VI. OFFICE AND SOCIAL ETIQUETTE

A. Bases of good manners:
   1. Respect for the other individual
   2. Social attitudes
   3. Understanding the role of each worker
B. Social graces at work:
   1. Greeting other workers
   2. Courtesy in working together—
      a. Using "please" and "thank-you"

        - b. Waiting patiently
        - c. Interrupting with care and consideration
        - d. Avoiding disturbances
        - e. Attending to individual's request
        - f. Respecting others
        - g. Fulfilling responsibilities independently
        - h. Cooperating in joint ventures
        - i. Lending or requesting a helping hand
- C. Maintaining comfortable office conditions:
    - 1. Adequate lighting
    - 2. Prompt servicing of equipment
    - 3. Comfortable temperatures and ventilation
    - 4. Smooth traffic flow
    - 5. Efficient organization of work space
- D. Social-business situations:
    - 1. Introductions and acknowledgments—
        - a. Social forms
        - b. Business forms
    - 2. The lady and gentleman in business—
        - a. Quasi-social situation behavior
        - b. Observation of amenities at work
        - c. Consideration of physical strengths
- E. At the restaurant:
    - 1. Leading to and seating at table
    - 2. Ordering
    - 3. Table manners
    - 4. Paying the check
- F. The office party or outing:
    - 1. Dressing appropriately
    - 2. Organizing the party—
        - a. Invitations and guest list
        - b. Activities and program
    - 3. Maintaining decorum
- G. Special social services:
    - 1. Congratulatory messages to employees and associates for the employer's signature
    - 2. Thank-you notes
    - 3. Reminding employer of family dates
- H. Problems in office behavior:
    - 1. Dating
    - 2. Borrowing and lending
    - 3. Close friendships
    - 4. Employee evaluations during social contacts
    - 5. In-groups
    - 6. Social acceptance of all workers

TOPIC VII. INTERPERSONAL RELATIONS

- A. Roles of motives and emotions
- B. Emotional conflicts:
    - 1. Causes
    - 2. Adjustment
- C. Intellectual awareness:
    - 1. The secretarial role
    - 2. Continuing growth of understanding, knowledge, and skills
    - 3. Demands of secretarial or stenographic position—
        - a. Confidences
        - b. Loyalties
        - c. Service
    - 4. Adjustment to change
    - 5. Maturity of judgment
    - 6. Responsibility for decision
- D. Relationships with others:
    - 1. Employer expectations
    - 2. Expectations of fellow workers
    - 3. Expectations of subordinates
    - 4. Expectations of customers, clients, and other executives
    - 5. Importance of initiative
    - 6. Dealing with others—
        - a. Meeting expectations
        - b. Anticipating needs
        - c. Developing understanding and acceptance
- E. Development of personal attributes:
    - 1. Punctuality
    - 2. Physical health
    - 3. Integrity
    - 4. Leadership
    - 5. Attitudes
    - 6. Resourcefulness
- F. Personal efficiency:
    - 1. Identifying job responsibilities
    - 2. Planning and organizing work
    - 3. Follow-up on work
- G. Self-appraisal and improvement:
    - 1. Methods of self-appraisal
    - 2. Self-improvement—
        - a. Broadening interests
        - b. Changing habits
        - c. Improving communication skills

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L.; MEEHAN, JAMES R.; AND OLIVERIO, MARY ELLEN. *Secretarial Office Practice, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

BARRON, ALLAN E., AND TAYLOR, JAMES R. *Clerical Office* Training. Englewood Cliffs, N.J.: Prentice-Hall, 1963.

BEAMER, ESTHER; HANNA, J. MARSHALL; AND POPHAM, ESTELLE L. *Effective Secretarial Practices, 4th ed.* Cincinnati: South-Western, 1962. Workbook and Manual.

DAVIS, KEITH. *Human Relations at Work, 2nd ed.* New York: McGraw-Hill, 1962.

FAMULARO, JOSEPH, AND ATKINSON, P. *Executive Development.* New York: McGraw-Hill, (in Press).

GREGG, JOHN R., AND OTHER. *Applied Secretarial Practice, 5th ed.* New York: McGraw-Hill, 1962.

HUTCHINSON, LOIS D. *Standard Handbook for Secretaries, 7th ed.* New York: McGraw-Hill, 1956.

JOHNSON, H. WEBSTER. *How To Use the Business Library, 3rd ed.* Cincinnati: South-Western, 1964.

KEILY, HELEN J., AND WALTERS, R. G. *How To Find and Apply for a Job, 2nd ed.* Cincinnati: South-Western, 1960.

LAIRD, DONALD A., AND LAIRD, ELEANOR C. *Practical Business Psychology, 3rd ed.* New York: McGraw-Hill, 1961.

LARSEN, LENNA A., AND KOEBELE, APOLLONIA M. *Reference Manual for Office Employees, 4th ed.* Cincinnati: South-Western, 1959.

LEE, DOROTHY; DICKINSON, TILLY; AND BROWER, WALTER. *Secretarial Practice for Colleges, 2nd ed.* New York: McGraw-Hill, 1965.

MILLER, BESSE M., AND DORIS, LILLIAN. *Complete Secretary's Handbook, 2nd ed. rev.* Englewood Cliffs, N. J.: Prentice-Hall, 1960.

MUSSELMAN, VERNON A., AND HUGHES, EUGENE. *Introduction to Modern Business.* Englewood Cliffs, N. J.: Prentice-Hall, 1964.

PERSONAL DEVELOPMENT

Functional Knowledge for Stenographers and Secretaries

Hours Class: 1 hour daily — Total: 40 hours

Description and Training Suggestions

This unit is devoted to improving the appearance and conduct of secretarial trainees to meet employer expectations. It should assist each trainee to make a good first impression while job seeking. It forms a base to help the trainee advance in her chosen career. This intensive unit, designed exclusively for female trainees, builds on some of the topics in the Secretarial Orientation unit. The last topic of this unit is related to the last topic in the Secretarial Procedures and Practices unit. The unit content should be useful for both entry and upgrading purposes.

This unit emphasizes personal hygiene, dress, makeup and hairstyling, posture, voice modulation, and job interview preparation. While some of the topical content can be conveyed by the teacher in a regular classroom, arrangements should be made for special classroom facilities so that the trainee can practice the various aspects of good grooming under the expert supervision of milliners, cosmeticians, models, etc. These experts should be selected carefully for their capability to give good lectures and conduct worthwhile workshops. Individual analyses of trainee makeup and hair style are strongly suggested to develop the aims of this unit. A field trip to the employment office of a large firm is also suggested. Liberal use of films, filmstrips, transparencies, tape recordings, case studies, dramatizations, role playing, reviews, self-tests, and group evaluations can be used to help trainees realize their own needs and to develop motivation for improvement. Role playing should be used to develop poise during job interviews. Evaluations of trainee achievement can be made by the teacher.

Standards of Achievement

1. Exhibit poise, good grooming, and understanding of personal hygiene.
2. Know proper dieting controls.
3. Exhibit good voice control.
4. Demonstrate job-interview preparation and poise.

Prerequisites for Study of Personal Development

Secretarial Orientation or Secretarial Procedures and Practices.

Topic Outline

I. Personal Care and Appearance
II. Dress
III. Voice Development
IV. Poise
V. Preparation for Job Interview

TOPIC I. PERSONAL CARE AND APPEARANCE

A. Posture:
  1. Standing
  2. Walking
  3. Sitting

- B. Figure control:
  - 1. Diet—
    - a. Nutrition
    - b. Weight control
  - 2. Exercise—
    - a. Daily routine
    - b. Planned recreation
    - c. Corrective exercises
  - 3. Silhouette control—
    - a. Girdles
    - b. Brassieres
- C. Complexion:
  - 1. Care—
    - a. Cleanliness
    - b. Skin nutrition
    - c. Treatment of skin flaws
  - 2. Standards for makeup
  - 3. Skill in applying makeup—
    - a. Facial structures: camouflage, highlighting
    - b. Eye makeup
    - c. Lip makeup
    - d. Finish
- D. Health and happiness:
  - 1. Regular dental care
  - 2. Regular medical checkups
  - 3. Careful health routine—
    - a. Sleep
    - b. Nutrition
    - c. Exercise
    - d. Special needs
  - 4. Emotional stability—
    - a. Recreation
    - b. Vacations
    - c. Interests and hobbies
  - 5. Intellectual growth and artistic development
- E. Legs, arms, and hands:
  - 1. Smooth legs and arms—regular use of depilatories and creams
  - 2. Beautiful hands—
    - a. Soft and smooth
    - b. Manicured nails of reasonable length and soft color
- F. Femininity:
  - 1. Deodorants and light perfumes
  - 2. Sweet breath

TOPIC II. DRESS

- A. Colors complimenting skin coloring
- B. Styles:
  - 1. Suitability, attractiveness, and conformity to fashion
  - 2. Basic styles for a wardrobe
  - 3. The "just rights" for the office
- C. Accessories:
  - 1. Requirements for shoes
  - 2. Requirements for purse
  - 3. Gloves
  - 4. Millinery
  - 5. Hosiery
  - 6. Jewelry
  - 7. Blending total picture without ostentation
- D. Blending components:
  - 1. Proper and "dash"
  - 2. Wearing all articles of clothing properly
  - 3. Maintaining cleanliness, good repair, fit, and length of all clothing
  - 4. Pre-planning wearing apparel for the week

TOPIC III. VOICE DEVELOPMENT

- A. Clarity and pleasantness:
  - 1. Pitch and tone
  - 2. Enunciation and pronunciation—
    - a. Lazy tongue
    - b. Environmental influences
  - 3. Rapidity
  - 4. Speech pattern and grammar
- B. Sparkling conversation:
  - 1. Building vocabulary
  - 2. Organizing thoughts
  - 3. Keeping abreast of the contemporary world
  - 4. Becoming a good listener

TOPIC IV. POISE

- A. Dignified, sparkling
- B. Resourceful
- C. Emotionally controlled:
  - 1. Facial grimaces
  - 2. Voice and speech patterns
  - 3. Hand and arm movements
- D. Tactful
- E. Courteous
- F. Socially correct
- G. Cultured

TOPIC V. PREPARATION FOR JOB INTERVIEW

- A. Preplanning:
  - 1. Preparing the résumé: neatness, organization, exactness, and correctness
  - 2. Choosing appropriate office attire
  - 3. Preparing answers to possible questions in the interview
  - 4. Searching out information about the company

B. Interview:
  1. Keeping poise
  2. Answering questions
  3. Elaborating with organized answers when queried
  4. Obtaining information tactfully—
    a. Job responsibilities
    b. Promotional opportunities and raises
    c. Salary
    d. Fringe benefits
  5. Creating a favorable impression on interviewer—
    a. Looking at him when answering questions
    b. Listening carefully
    c. Sensitivity to termination of interview
  6. Making a decision—
    a. On the spot
    b. Following interview—waiting period

C. Follow-up procedures:
  1. Thank-you letter for interview
  2. Acceptance or rejection of offer

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L.; MEEHAN, JAMES R.; AND OLIVERIO, MARY ELLEN. *Secretarial Office Practice, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

BEAMER, ESTHER K.; HANNA, J. MARSHALL; AND POPHAM, ESTELLE L. *Effective Secretarial Practices, 4th ed.* Cincinnati: South-Western, 1962. Workbook and Manual.

JOHNSON, H. WEBSTER. *How To Use the Business Library, 3rd ed.* Cincinnati: South-Western, 1964.

KEILY, HELEN J., AND WALTERS, R. G. *How To Find and Apply for a Job, 2nd ed.* Cincinnati: South-Western, 1960.

POWERS, JOHN R. *How To Have Model Beauty, Poise and Personality.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

RUSSON, ALLIEN R. *Business Behavior, 3rd ed.* Cincinnati: South-Western, 1964.

SFERRA, ADAM; WRIGHT, MARY E.; AND RICE, LOUIS A. *Personality and Human Relations, 2nd ed.* New York: McGraw-Hill, 1961.

WHITCOMB, HELEN, AND LANG, ROSALIND. *Charm: The Career Girl's Guide to Business and Personal Success.* New York: McGraw-Hill, 1964. Workbook and Teacher's Manual.

SECRETARIAL PROCEDURES AND PRACTICES

Functional Requirement for Stenographers and Secretaries

Hours Class: 1 hour daily   Total: 40 hours

Description and Teaching Suggestions

This unit of study is designed to develop additional trainee understanding and skills in the fundamental functional duties of stenographers and secretaries. The unit builds on material presented in Secretarial Orientation. The ability to follow efficient work procedures in completing common office tasks is fundamental to the most productive use of the basic stenographic and secretarial worker skills. This unit must be taught with a concern for the development of procedures that are acceptable and complete and, at the same time, not contain any unnecessary steps. By focusing on "a way of doing"—whether in relation to handling mail, using a reference book, or some other task—the teacher will help the trainee to develop the processes for doing far more tasks than those selected for this unit. The unit should start by acquainting the trainess with the normal functional duties of secretaries and stenographers. Following the introduction to each of the unit's topical areas, trainees should practice the procedures to develop their own competencies. Various audio-visual aids (tape recorder, telephone set-up with feedback mechanism, etc.) and secretarial equipment should be available for simulating office conditions during the practice sessions. The use of telephone exercises in voice control will provide better training than a mere exposition of telephone and voice problems. More intensive telephone training will be provided in Receptionist and Telephone Training. Many case studies and problem situations should be used for this unit. Recommended references should be made available for study. Trainees should be given problems that require them to research information in the systematic fashion taught in the discussion of the topic. Topics such as duplicating processes and mail handling should give the trainees opportunities to prepare appropriate materials.

Pencil and paper tests of knowledge should be supplemented by job achievement tests (prepare, proof, and run a stencil, for example). Situational tests such as handling telephone calls and in-basket material should also be used.

Standards of Achievement

1. Answer and use telephone using business etiquette and standard telephone practices.
2. Receive, screen, and route callers and make appointments courteously.
3. Use standard and special sources of information for secretary and employer.
4. Set up secretarial work space—order and store office supplies.
5. Prepare and proofread ordinary business copy for simple duplicating processes.
6. Operate simple duplicators—stencil, spirit, and direct-process machines.
7. Handle and route mail.
8. Demonstrate process of locating employment.

Prerequisites for Study of Secretarial Procedures and Practices

General Office Education Units suggested in the *Curricula Synopses* section or demonstrated proficiencies meeting standards of achievement for those units.

Topic Outline

I. Telephone Procedure
II. Meeting the Public
III. Use of Sources of Information
IV. Use of Equipment and Supplies
V. Use of Duplicating Processes
VI. Handling the Mail
VII. Working with the Employer
VIII. Good Housekeeping
IX. Job Finding

TOPIC I. TELEPHONING PROCEDURE

A. The importance of the voice
B. Telephone manners
C. General policies in handling telephone calls:
    1. Ways of handling identification
    2. Information that is to be revealed or withheld
D. Calls that an office worker makes:
    1. Nature of such calls
    2. How calls are made—
        a. In the company
        b. Local
        c. Toll
E. Calls that an office worker receives:
    1. Nature of such calls
    2. How calls are handled (include special monitor and transfer equipment)
F. Telephone practice exercises

TOPIC II. MEETING THE PUBLIC

A. The company's relation to the public:
    1. The need to be helpful
    2. The need to convey the attitude of the company toward the public
B. How people are received:
    1. Greeting callers
    2. Determining caller needs
    3. Taking care of needs satisfactorily
    4. Handling callers who have appointments
C. Making appointments:
    1. Office record of appointment
    2. Confirmation to caller
D. Practice exercises in reception duties

TOPIC III. USE OF SOURCES OF INFORMATION

A. References for the secretary's desk:
    1. Dictionaries
    2. Secretarial handbooks
    3. Style books
    4. Books of quotations and special references
    5. Etiquette books
B. Business references:
    1. The telephone directory
    2. The city directory
    3. Various trade and professional directories
    4. Congressional directory
    5. Credit directories
C. Compilations of facts:
    1. The World Almanac
    2. Atlas
    3. Postal and shipping guides
    4. Special dictionaries
    5. News indexes
    6. Catalogues of publishers and suppliers
    7. Government publications
    8. Encyclopedias
    9. Who's Who publications
    10. Business Periodicals Index
    11. Reader's Guide to Periodical Literature
D. Procedures for determining where to look
E. Procedures for becoming acquainted with a particular reference
F. Procedures for taking notes

G. Procedures for seeking information by telephone:
   1. Possible sources for information—
      a. Local library
      b. Publication office
      c. Newspaper office
   2. Manner in which requests are made

H. Practice exercises in locating information

TOPIC IV. USE OF EQUIPMENT AND SUPPLIES

A. Care and use of desk and basic equipment:
   1. Setting-up and maintaining work station (review)
   2. Reporting needed repairs

B. Available supplies and their efficient use:
   1. Letterheads
   2. Carbon sheets and carbon packs
   3. Typewriter ribbons
   4. Various forms and special papers

C. Securing supplies and equipment:
   1. Requisitioning methods
   2. Systematic storage of supplies

D. Practice in setting up desks, work areas, and requisitioning

TOPIC V. USE OF DUPLICATING PROCESSES

A. Need for duplication

B. Methods of duplication and costs:
   1. Copying equipment
   2. Direct process
   3. Stencil duplication
   4. Offset process

C. Choice of equipment suitable to need

D. Preparation of copy for duplication:
   1. Materials used
   2. Making corrections
   3. Proofreading practices
   4. Judging quality of final copy

E. Practice preparation of copy and duplication

TOPIC VI. HANDLING THE MAIL

A. Receiving mail:
   1. By company
   2. By secretary

B. The secretary's responsibility for incoming mail:
   1. Policies
   2. Mail-handling procedures—
      a. Opening and marking
      b. Securing related materials from files
      c. Placing the mail on the employer's desk

C. The secretary's responsibility for outgoing mail:
   1. Checking before release for mailing
   2. Determining class of service
   3. Setting a schedule in relation to company procedures for handling mail

D. Handling volume mailings:
   1. Use and maintenance of mailing lists
   2. Preparation of materials
   3. Routines for volume stuffing and sealing

E. Practice exercise in handling mail

TOPIC VII. WORKING WITH THE EMPLOYER

A. Employer's responsibilities:
   1. Responsibilities in relation to superiors
   2. Variations in the work load

B. Differences in secretary-employer working relationships:
   1. Delegation of responsibility
   2. Supervision given
   3. Work schedules
   4. Employer's desire for initiative on the part of the secretary

C. The cooperative aspects of office work:
   1. The need for routines and schedules
   2. The need for verification and confirmation of actions

TOPIC VIII. GOOD HOUSEKEEPING

A. Maintenance of efficiency and attractiveness of the office

B. Maintenance of order in files, desk, supply closets, lockers, and other office areas

C. Relationships with the maintenance department

TOPIC IX. JOB FINDING

A. Sources of jobs available:
   1. Personal acquaintances
   2. Employment agencies (public, private)
   3. Direct communication with potential employers

B. Review of preparing information about competencies:
   1. Writing descriptive and accurate letters
   2. Developing personal data sheet or résumé

C. Review of preparation for personal interview:
   1. Proper dress
   2. Proper manners

D. Becoming acquainted with a company in which you are interested:
   1. Through published sources
   2. Review of information secured during personal interview

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher material for use in this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L., AND MEEHAN, JAMES R. *Clerical Office Practice, 3rd ed.* Cincinnati: South-Western, 1961. Workbook, Achievement Tests, and Manual.

AGNEW, PETER L.; MEEHAN, JAMES R.; AND OLIVERIO, MARY ELLEN. *Secretarial Office Practice, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

BARRON, ALLAN E., AND TAYLOR, J. *Clerical Office Training.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

BEAMER, ESTHER K.; HANNA, J. MARSHALL; AND POPHAM, ESTELLE L. *Effective Secretarial Practices, 4 ed.* Cincinnati: South-Western, 1962. Workbook and Manual.

DORIS, LILLIAN, AND MILLER, BESSE M. *Complete Secretary's Handbook, 2nd ed. rev.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

FRIEDMAN, SHERWOOD, AND GROSSMAN, J. *Secretarial Practice.* New York: Pitman, 1960.

GREGG, JOHN R., AND OTHERS. *Applied Secretarial Practice, 5th ed.* New York: McGraw-Hill, 1962.

HUTCHINSON, LOIS D. *Standard Handbook for Secretaries, 7th ed.* New York: McGraw-Hill, 1956.

KEILY, HELEN J., AND WALTERS, R. G. *How To Find and Apply for a Job, 2nd ed.* Cincinnati: South-Western, 1960.

LARSEN, LENNA A., AND KOEBELE, APOLLONIA M. *Reference Manual for Office Employees, 4th ed.* Cincinnati: South-Western, 1959.

LEE, DOROTHY; DICKINSON, TILLY; AND BROWER, WALTER. *Secretarial Practice for Colleges, 2nd ed.* New York: McGraw-Hill, 1965.

PLACE, IRENE, AND HICKS, CHARLES. *College Secretarial Procedures, 3rd ed.* New York: McGraw-Hill, 1964.

STRONY, MADELINE; SMITH, MARY; AND GARVEY, CLAUDIA. *The Secretary at Work, 3rd ed.* New York: McGraw-Hill, 1966.

INDEXING AND FILING PRACTICES

Basic Job Skill for Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily Total: 30 hours

Description and Teaching Suggestions

This unit will assist trainees to understand business filing requirements and to develop skills in filing and indexing. The unit should provide the trainee with the sense of system and order necessary to maintain records in a business office. Emphasis is placed on the rules and practices of alphabetic filing. Geographic and numeric systems also should be discussed and practiced. Identification, storage, and retrieval methods should be the heart of the training, and practice in retrieving filed information should also be given. The laboratory time should be used exclusively for practice, and the laboratory should have book files, rotary files, drawer files, open-shelf files, and vertical files. Every subtopic presented in class should be followed by practice in the laboratory sessions. After participating in drills using single filing rules, trainees should practice filing procedures requiring a whole range of rules. Power files and other special equipment files, such as microfilm and readers, should be mentioned. Filing computer tapes and punched cards will be covered in Business Data Processing Fundamentals. They should be mentioned, but not discussed in detail, since this type of filing is usually handled by special workers.

Teachers should compile lists of names from telephone directories to be given to the trainees for typewriting on cards, sorting, and filing. Visits to local business offices by the trainees to observe filing systems is suggested to highlight the importance of adequate and proper filing practices. Written tests should be given to evaluate basic knowledge. Achievement tests of skills meeting the Standards of Achievement for the unit should be given considerable weight.

Standards of Achievement

1. On fifty 3- by 5-inch cards, type 50 names and file cards accurately in 40 minutes.
2. File accurately fifty to eighty 3- by 5-inch cards in 20 minutes.
3. File accurately sixty to ninety pieces of correspondence in 20 minutes.
4. Index a variety of documents having names, geographical locations, or numbers.

Prerequisites for Study of Indexing and Filing Practices

Production Typing I.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Why a Business Maintains Files
II. Nature of Business Records

III. Basic Rules for Alphabetic Indexing
IV. Basic Rules for Numeric Filing
V. Filing Material
VI. Special Files
VII. Filing Equipment
VIII. Information Retrieval
IX. Retention and Purging of Files

TOPIC I. WHY A BUSINESS MAINTAINS FILES

A. Need for efficient storing of repetitively used records
B. Need to retrieve information

TOPIC II. NATURE OF BUSINESS RECORDS

A. Correspondence files:
    1. Variations in systems
    2. Variations in types of equipment
B. Examples of files:
    1. Personnel department
    2. Raw materials inventory maintenance
    3. Financial department
    4. Miscellaneous files

TOPIC III. BASIC RULES FOR ALPHABETIC INDEXING

A. Terms used in indexing
B. Rules for indexing:
    1. Individual names
    2. Variations in names and applicable rules
    3. Company names
    4. Variations in company names and applicable rules
    5. Special consideration—deviations from basic rules
    6. Geographic location filing
    7. Subject files
    8. Cross-referencing
C. Practice exercises and drills of all topics in B

TOPIC IV. BASIC RULES FOR NUMERIC FILING

A. Use of numeric files
B. Cross reference to alphabetic order
C. Chronological files (include follow-up files)

TOPIC V. FILING MATERIAL

A. Procedures for maintaining a correspondence file:
    1. Nature of file folders
    2. Placement of material in the folder
    3. Designation of active vs. inactive material
B. Handling of correspondence:
    1. Notations for signaling materials ready for filing
    2. Procedure for preparing materials for filing—
        a. Inspecting
        b. Indexing
        c. Coding
        d. Sorting
        e. Labeling or marking folder
        f. Inserting
C. Practice filing projects using operations in B

TOPIC VI. SPECIAL FILES

A. Central files (where volume is large):
    1. Filing material
    2. Charging out-of-file materials
B. Microfilms
C. Computer tape files
D. Punched card

TOPIC VII. FILING EQUIPMENT

A. Cabinets (drawer-type)
B. Open shelf
C. Desk
D. Card files
E. Rotary
F. Visible
G. Vertical
H. Power

TOPIC VIII. INFORMATION RETRIEVAL

A. Identifying nature of information or document to be retrieved
B. Knowing company filing system
C. Computer or microfilm use

TOPIC IX. RETENTION AND PURGING OF FILES

A. Permanent record identification
B. Length of retention for certain records
C. Identification of active and inactive records
D. Purging files according to company policy
E. Transfer and storage of file information

NOTE: A filing system, such as the Varidex System (Remington Rand), Super-Ideal (Shaw-Walker), The Smead System, or other should be shown and explained, if available.

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

BASSETT, ERNEST D., AND OTHERS. *Business Filing and Records Control, 3rd ed.* Cincinnati: South-Western, 1963. Practice Set and Manual.

FAHRNER, WILLIAM F., AND GIBBS, WILLIAM F. *Basic Rules of Alphabetic Filing, Programmed Instruction.* Cincinnati: South-Western, 1965. Manual.

GRIFFIN, MARY C. *Records Management.* Boston: Allyn and Bacon, 1964.

Guthrie, Mearl R. *Alphabetic Indexing, 3rd ed.* Cincinnati: South-Western, 1964. Manual.

Kahn, Gilbert, and others. *Progressive Filing, 7th ed.* New York: McGraw-Hill, 1961.

———. *Gregg Quick Filing Practice.* New York: McGraw-Hill, 1965.

———. *Progressive Filing and Records Management College Series.* New York: McGraw-Hill, 1962.

Keithley, Erwin M. *A Manual of Style for the Preparation of Papers and Reports.* Cincinnati: South-Western, 1959.

Kish, Joseph L., and Morris, J. *Paperwork Management in Transition.* New York: American Management Association, 1964. Teacher's Reference.

Place, Irene, and Popham, Estelle. *Filing and Records Management.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

Selden, William H., and others. *Filing and Finding.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

Weeks, Bertha M. *Filing and Records Management, 3rd ed. rev.* New York: Ronald Press, 1964.

Practice Sets

Bassett, E. D., and Agnew, P. L. *Filing Practice Set.* Cincinnati: South-Western, 1963.

Filing Practice Set. Baltimore: The H. M. Rowe Co.

Indexing and Filing Workbook. Baltimore: The H. M. Rowe Co.

Job Sheets and Tests for Filing and Finding. Englewood Cliffs, N.J.: Prentice-Hall.

Kahn, G.; Yerian, T.; and Stewart, J. *Practice Materials in Progressive Filing, College Series.* New York: McGraw-Hill, 1962.

———. *Practice Materials for Progressive Filing, 7th ed.* New York: McGraw-Hill, 1961.

Principles of Indexing and Filing, 4th ed. Baltimore: The H. M. Rowe Co.

OFFICE MACHINES—COMPUTING AND DUPLICATING

Basic Skill for Stenographers and Secretaries

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

This unit is designed to develop mastery of the 10-key adding machine and simple duplicators. It also acquaints the trainee with other calculating machines and duplicators. The preparation of masters or stencils and the operation of duplicating machines are both stressed. Trainees should become familiar with various types of transcribing machines or voice writers. Where school facilities are limited, teachers should make arrangements to borrow machines at appropriate times during the course of study. Literature on duplicating equipment may be obtained from equipment manufacturers. Each trainee should be given an opportunity to choose the appropriate duplicating process for a piece of work, to prepare the materials, and to run the machine. Equipment in office machines laboratories should be made available to trainees who are studying the Elements of Fiscal Records unit concurrently. Trainees should be evaluated by means of objectives tests, such as those found in many of the manuals and texts suggested in the teaching materials list. Observation by the teacher of the trainee's skill in using machines and equipment should be included in the evaluation. The Record of Completion should show the types of machines that the trainee has used.

Standards of Achievement

1. Prepare masters and stencils, operate spirit and fluid duplicators, and operate wet and/or dry process photocopiers.
2. Perform all operations proficiently on 10-key adding machines.
3. Operate rotary and printing calculators.

Prerequisites for Study of Office Machines—Computing and Duplicating

Production Typing I.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Ten-Key Adding Machines and Printing Calculators
II. Rotary Calculators
III. Spirit Duplicators
IV. Stencil Duplicators
V. Dry and Wet Process Photocopiers
VI. High-Volume Reproduction

TOPIC I. TEN-KEY ADDING MACHINES AND PRINTING CALCULATORS

A. Adding by touch
B. Subtraction

C. Multiplication
D. Decimals and fractions, conversion
E. Division on printing calculator

TOPIC II. ROTARY CALCULATORS

A. Addition
B. Subtraction
C. Multiplication
D. Division
E. Fractions and decimals

TOPIC III. SPIRIT DUPLICATORS

A. When to use spirit duplication (costs and use of copies) and limitations
B. Preparation of master (including proper backing)
C. Artwork on master (also indicate color processes available)
D. Correction of master
E. Operation and care of machine

TOPIC IV. STENCIL DUPLICATORS

A. When to use stencil duplication (costs and use of copies) and limitations
B. Preparation of stencil
C. Artwork on stencil
D. Operation of machine

TOPIC V. DRY AND WET PROCESS PHOTOCOPIERS

A. Wet process photocopiers:
    1. Costs, limitations, and production rates
    2. Care of machine and supplies
    3. Safety precautions needed for some machines
B. Dry process photocopiers:
    1. Costs, limitations, and production rates
    2. Care of machine and supplies

TOPIC VI. HIGH-VOLUME REPRODUCTION

A. Criteria for choosing a particular method of high-volume reproduction
B. Multilith process
C. Offset process
D. Practice in preparing multilith masters and camera-ready copy

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L. *Machine Office Practice.* Cincinnati: South-Western, 1965. Practice Set.

AGNEW, PETER L., AND CORNELIA, NICHOLAS J. *Office Machines Courses, 3rd ed.* Cincinnati: South-Western, 1962. Teacher's Manual and Test.

AGNEW, PETER L., AND MEEHAN, JAMES R. *Clerical Office Practice, 3rd ed.* Cincinnati: South-Western, 1961. Workbook, Achievement Tests and Manual.

AGNEW, PETER L., AND PASEWARK, WILLIAM R. *Rotary Calculator Course, 4th ed.* Cincinnati: South-Western, 1962. Teacher's Manual and Test.

———. *Ten Key Adding-Listing Machine and Printing Calculator Course, 3rd ed.* Cincinnati: South-Western, 1963. Achievement Test and Manual.

ARCHER, FRED C.; BRECKER, RAYMOND F.; AND FRAKES, JOHN C. *General Office Practice, 2nd ed.* New York: McGraw-Hill, 1963. (Chapters 17, 18, 19)

CANSLER, RUSSELL N., EDITOR. *Fundamentals of Mimeographing.* Chicago: The School Department, A. B. Dick Co., 1963.

DOOL, J. J. *Business Machine Exercises.* New York: McGraw-Hill, 1964. Workbook and Solutions Manual.

FASNACHT, HAROLD D., AND BAUERNFEIND, HARRY B. *How To Use Business Machines, 2nd ed.* New York: McGraw-Hill, 1962. Workbook and Instructor's Key.

Learning How To Use Ditto D-10 Duplicator. Chicago: Ditto, Inc.

MEEHAN, JAMES R. *Using Rotary Calculators in the Modern Office.* New York: McGraw-Hill, 1965. Workbook and Instructor's Guide.

MEEHAN, JAMES R., AND KAHN, GILBERT. *How To Use Adding Machines.* New York: McGraw-Hill, 1962. Workbook and Instructor's Guide.

PACTOR, PAUL. *Business Machines Projects.* New York: Pitman, 1962.

PACTOR, PAUL, AND JOHNSON, NIRA M. *Business Machines Course.* New York: Pitman, 1961.

WALKER, ARTHUR L.; ROACH, J. KENNETH; AND HANNA, J. MARSHALL. *How To Use Adding and Calculating Machines, 2nd ed.* New York: McGraw-Hill, 1960. Workbook, Teacher's Manual, and Key.

RECEPTIONIST AND TELEPHONE TRAINING

Basic Skill for Stenographers and Secretaries

Hours Class: 1 hour daily Total: 15 hours

Description and Teaching Suggestions

This intensive unit focuses on practice in two areas of work associated with almost every job in the occupational field. The unit is adjunctive to topics I and II of Secretarial Procedures and Practice and provides the background information and skills essential to good telephone technique and receptionist duties. The separation of this unit from related topics, underscores the importance of these functions to secretaries and stenographers alike.

The smooth functioning of the office is enhanced by the ability of the secretary or stenographer to use proper telephone techniques and to greet and display courtesy to office visitors. The ability to help the employer keep appointments, effect referrals with tact, and maintain office visit and appointment records further improves the secretarial image and reflects upon the employer's standards. Films, filmstrips, tape recordings, discussions, case studies, practice on the teletrainer involving role playing, lectures by telephone company representatives, and practice in completing telephone forms are suggested as teaching aids. Projects in completing office forms and participation in simulated office experiences relating to receptionist duties, involving the entire class, are essential in developing receptionist skills. Ample practice time should be allowed each trainee in both major areas of this unit.

Standards of Achievement

1. Use various types of telephone equipment for conference, sequence, and toll calls.
2. Complete office forms usually associated with telephone usage.
3. Demonstrate effective telephone techniques regarding greeting, referrals, voice control, and routing of calls.
4. Greet all types of office callers, make them comfortable, introduce them, and refer them to proper persons.
5. Keep employer appointment records.

Prerequisites for Study of Receptionist and Telephone Training

General Office Education Units as suggested.

Topic Outline

I. Acquiring Basic Telephone Information
II. Developing an Attractive Telephone Voice
III. Handling Calls
IV. Keeping Telephone Records
V. Receiving Office Visitors
VI. Housekeeping in Receptionist Area
VII. Managing Appointments and Appointment Records

TOPIC I. ACQUIRING BASIC TELEPHONE INFORMATION

A. Types of telephone calls:
  1. Local—unit or units
  2. Toll—operator, direct distance dialing, centrex, direct inward dialing—
    a. Person-to-person
    b. Station-to-station
    c. Conference
    d. Appointment
    e. Sequence
    f. Enterprise
    g. Broad band service
B. Effect of time zones
C. Types of equipment:
  1. PBX
  2. Call director
  3. Button phone
  4. Data phone
D. Directories:
  1. Alphabetic
  2. Classified
E. Special services:
  1. Information
  2. Weather
  3. Time
  4. Automatic answering and recording equipment
  5. Mobile service

TOPIC II. DEVELOPING AN ATTRACTIVE TELEPHONE VOICE

A. Elements of speech: tone, pitch, inflection, resonance, speed, volume
B. Attitudes:
  1. Concentrating on conversation
  2. Speaking to the person not the phone
  3. Conveying friendly, cooperative, and interested impressions

TOPIC III. HANDLING CALLS

A. Incoming calls:
  1. Prompt answering
  2. Identification
  3. Screening calls—
    a. Getting information—
      (1) For whom
      (2) From whom
      (3) Purpose
    b. Giving information—
      (1) Unavailability of executive
      (2) Helpful suggestions
    c. Transferring call—
      (1) Technique in flashing operator

        - (2) Understanding and agreement of caller to be transferred
    - 4. Getting information from employer as to where he can be reached
    - 5. Putting call through to employer
    - 6. Taking messages—office form
    - 7. Terminating calls
- B. Outgoing calls:
    - 1. Local calls
    - 2. Toll calls—
        - a. Decision as to service desired
        - b. Use of DID, DDD, etc.
        - c. Rapid contact of employer when party is ready

TOPIC IV. KEEPING TELEPHONE RECORDS

- A. Itemized accounting of toll calls and charges
- B. Recording conversations
- C. Keeping record of frequently called numbers

TOPIC V. RECEIVING OFFICE VISITORS

- A. Appointments:
    - 1. Greeting caller
    - 2. Handling details—
        - a. Caring for hat and coat
        - b. Seating comfortably
        - c. Providing reading matter
    - 3. Announcement to employer
    - 4. Escorting to office—
        - a. Introducing to employer
        - b. Withdrawing or remaining
    - 5. Meeting emergencies—
        - a. Handling the long wait
        - b. Making another appointment
        - c. Cancelling an appointment by telephone, by telegram, or in person
        - d. Interrupting a meeting
            - (1) Using intercom
            - (2) Unobtrusive notification
- B. Unexpected callers:
    - 1. Obtaining information, affiliation, and purpose of call
    - 2. Making judgments—
        - a. Referral
        - b. Setting appointment
        - c. Seeking preference of employer
    - 3. Meeting preferences of employer

TOPIC VI. HOUSEKEEPING IN RECEPTIONIST AREA

- A. Keeping order and attractiveness
- B. Providing current reading materials
- C. Checking cleaning services

TOPIC VII. MANAGING APPOINTMENTS AND APPOINTMENT RECORDS

- A. Maintaining employer's and secretary's desk calendars
- B. Keeping caller's register
- C. Updating card file of each visitor:
    - 1. Date
    - 2. Time
    - 3. Subject
    - 4. Decisions
    - 5. Referral
- D. Planning all meetings and appointments and previewing commitments weekly and daily
- E. Easing employer's burden:
    - 1. Proper scheduling: timing, overlapping, breaks
    - 2. Supplying background information: files, reports
    - 3. Preparing daily card of appointments for easy reference by employer
    - 4. Making referrals

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L., AND MEEHAN, JAMES R. *Clerical Office Practice.* Cincinnati: South-Western, 1961. Workbook, Achievement Tests, and Manual.

AGNEW, PETER L.; MEEHAN, JAMES R.; AND OLIVERIO, MARY ELLEN. *Secretarial Office Practice, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

ARCHER, FRED C.; BRECKER, RAYMOND F.; AND FRAKES, JOHN C. *General Office Practice.* New York: McGraw-Hill, 1963.

BEAMER, ESTHER K.; HANNA, J. MARSHALL; AND POPHAM, ESTELLE L. *Effective Secretarial Practices, 4th ed.* Cincinnati: South-Western, 1962. Workbook and Manual.

GREGG, JOHN R., AND OTHERS. *Applied Secretarial Practice, 5th ed.* New York: McGraw-Hill, 1962.

LEE, DOROTHY; DICKINSON, TILLY; AND BROWER, WALTER. *Secretarial Practice for Colleges, 2nd ed.* New York: McGraw-Hill, 1965.

PLACE, IRENE, AND HICKS, CHARLES. *College Secretarial Procedures, 3rd ed.* New York: McGraw-Hill, 1964.

Telephone Company Pamphlets and Local Telephone Directories.

Teletrainer Equipment and Materials. Telephone Company.

WOOD, MERLE, AND MCKENNA, MARGARET. *The Receptionist, A Practical Course in Office Reception Techniques.* New York: McGraw-Hill, 1966.

BUSINESS MATHEMATICS

Basic Skill for Stenographers and Secretaries

Hours Class: 1 hour daily Total: 30 hours

Description and Teaching Suggestions

The four fundamental mathematical operations, addition, subtraction, multiplication, and division, are reviewed, and their application to business computations are emphasized. The trainee should be given exercises in applying the skills to problems in percentage, interest, discounts, payroll, depreciation, expense accounts, etc. Another objective of the unit is to develop the trainee's ability to apply short-cut methods and to work, with speed and accuracy, either with or without calculating and adding machines. Study of this unit will facilitate mathematical computations performed in Elements of Fiscal Records and Payroll Records. The teacher should relate the specific computational skill, as reviewed, to job applications, to insure the optimum results for all trainees. Practice sets of different types should be employed when available. Pencil and paper objective tests should be used to assess the trainee's facility with numbers.

Standards of Achievement

Perform arithmetic calculations involving percentages, averages, measurements, and simple money transactions requiring proficiency in addition, subtraction, multiplication, division, and conversion of fractions and decimals (95 percent accuracy on tests).

Prerequisites for Study of Business Mathematics

Trainee selection standards.

Topic Outline

I. Addition
II. Subtraction
III. Multiplication
IV. Division
V. Fractions
VI. Percentage
VII. Interest
VIII. Discounts
IX. Business Mathematics Applications

TOPIC I. ADDITION

A. Improving skills:
    1. Adding whole numbers
    2. Increasing speed
    3. Checking accuracy
B. Types of addition:
    1. Horizontal
    2. Vertical
    3. Combination
C. Addition of decimals
D. Application to expense accounts, columnar tallies, etc.

TOPIC II. SUBTRACTION

A. Improving skills:
    1. Subtracting whole numbers
    2. Increasing speed
    3. Checking accuracy
B. Horizontal subtraction
C. Subtraction of decimals

TOPIC III. MULTIPLICATION

A. Improving skills:
    1. Multiplying whole numbers
    2. Increasing speed
    3. Checking multiplication accuracy
B. Multiplying decimal numbers
C. Shortcuts in multiplication
D. Horizontal multiplication
E. Price extensions

TOPIC IV. DIVISION

A. Improving skills:
    1. Division of whole numbers
    2. Increasing speed
    3. Checking division accuracy
B. Dividing decimal numbers
C. Shortcuts in division
D. Computing averages

TOPIC V. FRACTIONS

A. Improving skills in using fractions:
    1. Changing fractions to equivalent fractions and decimals
    2. Addition
    3. Subtraction
    4. Multiplication
    5. Division
B. Aliquot parts

TOPIC VI. PERCENTAGE

A. Improving skills in using percentage:

    1. Percentage value in equivalent forms
    2. Decimal numbers and fractions as percentage values
    3. The percentage formula
  B. Computing depreciation charges

TOPIC VII. INTEREST

  A. Interest formulas
  B. Simple interest
  C. Compound interest
  D. Discounting
  E. Installment interest
  F. 60-day method

TOPIC VIII. DISCOUNTS

  A. Trade discounts
  B. Cash discounts
  C. Markup
  D. Markdown

TOPIC IX. BUSINESS MATHEMATICS APPLICATIONS

  A. Job situation applications:
    1. Bank reconciliation
    2. Depreciation
    3. Interest comparison
    4. Taxes
    5. Inventory
    6. Purchase and sales invoices
    7. Payroll
    8. Petty cash
  B. Techniques of application:
    1. Making change
    2. Shortcuts
    3. Machine application (as available) –
      a. Ten-key adding
      b. Full-bank adding
      c. Calculators

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

BEIGHEY, CLYDE, AND BORCHARDT, GORDON C. *Mathematics for Business, College Course, 4th ed.* New York: McGraw-Hill, 1965. Workbook and Tests.

BRIGGS, MILTON. *Mathematics Skill Builder, 2nd ed.* Cincinnati: South-Western, 1960. Manual.

———. *Programmed Supplement for Mathematics Skill Builder, 2nd ed.* Cincinnati: South-Western, 1965. Manual.

CUTLER, ANN, AND MCSHARE, RUDOLPH. *The Trachtenberg Speed System of Basic Mathematics.* New York: Doubleday and Co., 1961.

Federal Tax Office—Special Kits: Enlarged Form 1040, Handbook, Blank forms, etc., for Federal income taxes.

HUFFMAN, HARRY. *Programmed Business Mathematics. Parts I, II, and III.* New York: McGraw-Hill, 1962.

KEELONG, JOHN K. *Tested Problems for Calculators and Listing Machines.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

MCCULLOUGH, ROBERT J., AND EVERARD, KENNETH. *Bank Reconciliation Projects.* New York: Pitman, 1959.

MCNELLY, A. E., AND OTHERS. *Business and Consumer Arithmetic, 5th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964. Workbook and Tests.

PENDERY, JOHN A. *Clerical Payroll Procedures, 4th ed.* Cincinnati: South-Western, 1965. Manual.

PENDERY, JOHN A., AND KELLING, B. LEWIS. *Payroll Records and Accounting.* Cincinnati: South-Western, 1966. Achievement Tests and Manual.

PIPER, EDWIN B., AND GRUBER, JOSEPH. *Applied Business Mathematics, 8th ed. Complete.* Cincinnati: South-Western, 1965. Workbook, Achievement Tests, Key, and Manual.

———. *Applied Business Mathematics, 8th ed. Abridged.* Cincinnati: South-Western, 1965. Workbook, Achievement Tests, and Key.

RICE, LOUIS A.; BOYD, ALFRED C.; AND MAYNE, F. BLAIR. *Business Mathematics for Colleges, 5th ed., Brief Course.* Cincinnati: South-Western, 1966. Inventory Test, Achievement Tests, and Manual.

ROSENBERG, R. ROBERT. *Business Mathematics—Exercises, Problems, and Tests, 3rd ed.* New York: McGraw-Hill, 1965.

———. *College Business Mathematics, 3rd ed.* New York: McGraw-Hill, 1961. Workbook, Tests, Teacher's Manual, and Key.

ROSENBERG, R. ROBERT, AND LEWIS, HARRY. *Business Mathematics, 6th ed.* New York: McGraw-Hill, 1963.

———. *Essentials of Business Mathematics, 6th ed.* New York: McGraw-Hill, 1964.

ELEMENTS OF FISCAL RECORDS

Basic Skill for Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily — Total: 60 hours

Description and Teaching Suggestions

Trainees are introduced to the principles of recordkeeping and bookkeeping and apply the knowledge acquired to actual business situations. The trainee will become acquainted with the fundamental accounting equation, debits and credits, journalizing, and posting. Concepts should be developed through the use of an apperceptive base to assist trainees to understand some business terminology. This approach can be implemented best through the use of the discussion method. Trainee participation during each session is essential.

Discussions should pertain to actual business problems selected in advance by the teacher. The problems and the necessary business forms and practice sets to be used in their solution should be duplicated or ordered in advance so that they may be distributed to the trainees. Specimens of actual business forms should also be used liberally during the course. Some of these forms are: checks, deposit slips, sales and purchase invoices, and petty cash slips. Class and laboratory time should be divided by the teacher so that trainees have maximum practime time, especially in the areas of bookkeeping, recording business transactions, and specialized, recording techniques. It is paramount that secretarial trainees understand the use of these fiscal recordkeeping and recording techniques. Since some employers may assign recordkeeping activities to stenographers, this unit should provide advance training to trainees who may be employed as stenographers. Materials used in the business world, and the extent to which the trainee will use them, will be determined by the employer or the firm's accounting requirements. Periodic quizzes are suggested to uncover areas of weakness.

Standards of Achievement

1. Set up and operate simple books of account.
2. Record simple cash and credit transactions, purchases, and sales.
3. Perform bank reconciliation.
4. Post simple transactions to journals and ledgers.
5. Perform simple trial balances.
6. Record petty cash transactions and expense statements.

Prerequisites for Study of Elements of Fiscal Records

Business Mathematics.

Demonstrated proficiencies equivalent to standards of achievement for above unit are acceptable.

Topic Outline

I. General Introduction
II. Introduction to Recordkeeping
III. Basic Bookkeeping Principles
IV. Recording Business Transactions
V. Trial Balance
VI. Bookkeeping for Merchandising Firms
VII. Specialized Recording Techniques
VIII. Cash Procedures

TOPIC I. GENERAL INTRODUCTION

A. Purpose of business (profit motives)
B. Need for records in business:
  1. Determining income or loss
  2. Preparing tax information
  3. Keeping accurate information about employees, customers, and creditors
  4. Preparing information for insurance companies

TOPIC II. INTRODUCTION TO RECORDKEEPING

A. Items for which records must be kept:
  1. Cash
  2. Merchandise
  3. Accounts receivable
  4. Accounts payable
  5. Equipment
  6. Supplies
  7. Other expenses
B. Definitions:
  1. Property (assets)
  2. Debts (liabilities)
  3. Ownership (proprietorship)

TOPIC III. BASIC BOOKKEEPING PRINCIPLES

A. Accounting equation—*A equals L plus P* (assets = liabilities + proprietorship):
  1. Elements of ownership and debt
  2. Symbols to note changes in assets, liabilities, and proprietorship. (+ and –)
B. Simple transactions affecting the relationship of assets, liabilities, and proprietorship
C. Proprietorship:

NOTE: Do NOT use purchases and sales at this point. Merchandising transactions will be developed in Topic VI.

  1. Review of definition of terms
  2. Introduction of concepts of income and expense
  3. Transactions involving income and expense
  4. Transaction and entries for the weekly salary—
    a. Expense (salary)
    b. Liabilities (deductions)
    c. Asset (cash paid to employee)
D. Summary review:
  1. Drill on accounting equation

    2. Use transactions for service industries only
    3. Include practice on simple income and expense transactions

TOPIC IV. RECORDING BUSINESS TRANSACTIONS

Note: Until the merchandising business (Topic VI) is introduced, use ONLY service industries to record transactions.

- A. Accounts
    - 1. T accounts
    - 2. Increases and decreases in T accounts (debit and credit) –
        - a. Left and right hand sides of account
        - b. Debit and credit in relationship to increases and decreases
        - c. Income and expense accounts–increase and decrease of proprietorship
    - 3. Ledger grouping of accounts
    - 4. Need for additional recordkeeping
- B. Journals:
    - 1. Why kept (daily recordkeeping)
    - 2. How to record transactions in a two column journal–journalizing procedure
- C. Drill in journalizing and posting–form and procedure

TOPIC V. TRIAL BALANCE

- A. Pencil footing accounts
- B. Preparation of the trial balance
- C. Location of errors

TOPIC VI. BOOKKEEPING FOR MERCHANDISING FIRMS

Note: Concept of cost of goods sold need not be taught to secretaries.

- A. Differentiated from a service company
- B. Merchandise inventory:
    - 1. Merchandise inventory as an asset
    - 2. Inventory until end of accounting period
    - 3. Year-end adjustments
    - 4. Sales and purchases as proprietorship accounts
- C. Transactions involving sales and purchases:
    - 1. Journalizing and posting
    - 2. Review accounts receivable and payable

TOPIC VII. SPECIALIZED RECORDING TECHNIQUES

Note: Discuss use of the journals presented below with particular emphasis on use by secretaries in small offices.

- A. Four-column cash journal–service organizations:
    - 1. Cash–debit and credit columns
    - 2. Sundry–debit and credit columns
- B. Multi-column cash journal–merchandising firms:
    - 1. Bank–debit and credit columns
    - 2. Check number column
    - 3. Purchases–debit
    - 4. Accounts payable–debit and credit
    - 5. Sales–credit
    - 6. Accounts receivable–debit and credit
    - 7. Sundry–debit and credit
- C. Posting procedures for above journals:
    - 1. Time-saving by special columns
    - 2. Items posted daily
    - 3. Items posted at end of month
- D. Review:
    - 1. Pencil-footing
    - 2. Trial balance

TOPIC VIII. CASH PROCEDURES

- A. Petty cash:
    - 1. Need and use
    - 2. Vouchers
    - 3. Petty cash sheet
    - 4. Replenishment
- B. Cash in bank:
    - 1. Review cash journal recording–major transactions–
        - a. Sales for cash
        - b. Payment of accounts payable
        - c. Receipt of monies owed
    - 2. Checks–checkbook, stubs
    - 3. Receipts–endorsements, deposit slips
    - 4. Bank statement–cancelled checks
    - 5. Bank reconciliation–
        - a. Balance on stub
        - b. Relation to general ledger cash account
        - c. Reconciling general ledger cash account with bank balance–
            - (1) Deposits in transit
            - (2) Checks outstanding
            - (3) Bank advices–charges and credits
- C. Cash on hand:
    - 1. Need to make change
    - 2. Constant balance
    - 3. Handling of shortage and overage

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Baron, Harold, and Steinfeld, Solomon C. *Clerical Record Keeping, 2nd ed.* Cincinnati: South-Western, 1965. Workbooks, Achievement Tests, and Teacher's Editions.

Barron, Allan E., and Taylor, James R. *Clerical Office Training*. Englewood Cliffs, N.J.: Prentice-Hall, 1963.

Carlson, Paul A.; Forkner, Hamden L.; and Boynton, Lewis D. *20th Century Bookkeeping and Accounting, 22nd ed. First-Year Course*. Cincinnati: South-Western, 1962. Workbooks, Teacher's Manual, Overhead Projector Transparencies, Tests, and Key.

Carson, Dr. A. B.; Sherwood, J. F.; and Boling C. (edited by Verna R. Evans). *Accounting Essentials for the Secretary, 2nd ed.* Cincinnati: South-Western, 1964. Working Papers, Accounting Test, and Key.

Ellsworth, Phil, and Jackson, Paul. *Applied Bookkeeping, 4th ed.* New York: McGraw-Hill, 1965.

Freeman, M. Herbert; Hanna, J. Marshall; and Kahn, Gilbert. *Gregg Bookkeeping and Accounting, 3rd ed.* New York: McGraw-Hill, 1963. Practice Sets, Workbooks, Objective Tests, Teacher's Manual, and Key.

Fritz, Noble, and Hoffman, Frank. *Bookkeeping Fundamentals: A Gregg Text-Kit in Continuing Education*. New York: McGraw-Hill, 1965.

Heiges, P. Myer; Schneider, Arnold E.; Huffman, Harry; and Stewart, J. *General Record Keeping, 5th ed.* New York: McGraw-Hill, 1965.

Janis, Arthur, and Miller, Morris. *Fundamentals of Modern Bookkeeping*. New York: Pitman, 1965. Workbook I, Transparencies, Tests, and Teacher's Manual.

Kirk, John, and others. *General Clerical Procedures, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

Mayne, F. Blair. *Accounting for Secretaries, 2nd ed.* New York. McGraw-Hill, 1957.

Olson, Milton C.; Zelliott, Ernest A.; and Leidner, Walter E. *Introductory Bookkeeping, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1961. Workbook I and Progress Tests.

Pendery, John A. *Record Keeping for Small Business, 3rd ed.* Cincinnati: South-Western, 1959. Key.

———. *Professional Projects*. Cincinnati: South-Western, 1962. Key.

Perry, Enos, C.; Frankes, John C.; and Zabornik, Joseph J. *Clerical Record Keeping, 2nd ed.* New York: Pitman, 1962.

Wheland, Howard E. *Bookkeeping Projects, 3rd ed.* Cincinnati: South-Western, 1963. Key.

PAYROLL RECORDS

Basic Skill for Secretaries

Hours Class: 1 hour daily; Laboratory: As required Total: 30 hours

Description and Teaching Suggestions

This unit will introduce trainees to the concepts of payroll recordkeeping. Considerable attention is given to the various forms required by government units. While the major emphasis is on the preparation of payrolls and attendant records for small business firms, the concepts included in this unit may also be applied to the payroll records of large organizations.

This unit was designed to be taught to students with little or no background in bookkeeping. Nonetheless, it may also be used concurrently with Elements of Fiscal Records.

This course requires that the teacher employ the lecture method to introduce payroll concepts. However, most class hours should be devoted to work on practice sets and problem materials. Along with the preparation of actual payroll accounting forms, this will motivate trainee participation and development of proficiency. Teachers should have practice sets available for group use.

Standards of Achievement

1. Compute gross and net earnings.
2. Deduct Federal, State, and local taxes such as income and others.
3. Prepare simple payrolls starting from time cards to journal entries and payroll book or ledger.
4. Prepare appropriate forms for employers and employees such as Federal depositary receipts, W–2, W–4, 940, 941, and unemployment and insurance forms.

Prerequisites for Study of Payroll Records

Trainee selection standards.

Elements of Fiscal Records (may be studied concurrently).

Topic Outline

I. Introduction to Payroll Accounting
II. Computation of Gross Earnings
III. Deductions from Gross Earnings to Determine Net Pay
IV. Recording the Payroll
V. Employer's Share of Payroll Tax Expense
VI. Forms Used in Payroll Accounting—and Their Preparation
VII. Methods of Preparing Payrolls

TOPIC I. INTRODUCTION TO PAYROLL ACCOUNTING

A. Need for payroll records
B. Employer-employee relationship

C. Definitions of and distinction between terms:
   1. Wages
   2. Salary

D. History of payroll legislation from 1913 to present:
   1. Withholding tax
   2. FICA
   3. Medicare
   4. Minimum wage

TOPIC II. COMPUTATION OF GROSS EARNINGS

A. Salaries:
   1. Weekly
   2. Biweekly
   3. Monthly
   4. Annual
   5. Overtime

B. Wages:
   1. Time cards
   2. Piece work
   3. Overtime
   4. Other

TOPIC III. DEDUCTIONS FROM GROSS EARNINGS TO DETERMINE NET PAY

A. Federal:
   1. FICA—current rates and rate changes
   2. Withholding tax—
      a. Dependents
      b. Methods of determining withholding tax—percentage method and government tables
   3. Medicare

B. State (where applicable):
   1. Income taxes
   2. Unemployment insurance
   3. Disability

C. City income taxes (as applicable)

D. Other:
   1. Savings bonds
   2. Hospitalization and insurance
   3. Union dues
   4. Pensions
   5. Garnishees
   6. Loans
   7. Credit unions
   8. Other

TOPIC IV. RECORDING THE PAYROLL

A. Debit salary expense—gross salary

B. Credit: Cash—net salary

C. Treatment of various deductions as current liabilities

TOPIC V. EMPLOYER'S SHARE OF PAYROLL TAX EXPENSE

A. FICA

B Unemployment:
   1. State
   2. Federal

C. Journal entries

TOPIC VI. FORMS USED IN PAYROLL ACCOUNTING—AND THEIR PREPARATION

A. W–4

B. W–2

C. 941

D. 940

E. Federal Depositary Receipt

F. State quarterly reports

G Unemployment information forms

H. Employees' earnings records

TOPIC VII. METHODS OF PREPARING PAYROLLS

A. Payroll journals and regular checks

B. Write-It-Once Forms (Hadley System)

C. Mechanized recording procedures

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Baron, Harold, and Steinfeld, Solomon C. *Clerical Record Keeping, 2nd ed.* Cincinnati: South-Western, 1965. Workbooks, Achievement Tests, and Teacher's Editions.

Hadley Editorial Staff and Thistlethwaite, Robert L. *Payroll Accounting, 5th ed.* New York: McGraw-Hill, 1961.

———. *Payroll Record Keeping, 7th ed.* New York: McGraw-Hill, 1965. Enveloped Kit and Teacher's Key.

Huffman, Harry. *Programmed Business Mathematics, Part II.* New York: McGraw-Hill, 1962.

Nanassy, Louis C. *Standard Payroll Project, 2nd ed.* New York: Pitman, 1962.

Pendery, John A. *Clerical Payroll Procedures, 4th ed.* Cincinnati: South-Western, 1962. Teacher's Manual.

Pendery, John A., and Keeling, B. Lewis. *Payroll Records and Accounting.* Cincinnati: South-Western, 1966. Achievement Tests and Manual.

Piper, Edwin B., and Gruber, Joseph. *Applied Business Mathematics, 8th ed., Complete.* Cincinnati: South-Western, 1965. Workbook, Achievement Tests, Key, and Manual.

COMMUNICATION AND BASIC LANGUAGE SKILLS

Basic Skill and Function Requirement for All Trainees in the Stenographic-Secretarial Occupational Field

Hours **Class: 1 hour daily** **Total: 60 hours**

Description and Teaching Suggestions

This foundation unit in communication skills has been designed with several purposes in mind. First, it stresses the importance of communication in both the business world and everyday living. Second, it provides for remedial training in the language-skill area by "slotting" trainees according to their proficiency with the English language as they start the unit. Third, it is presented so that the proper use of language skills are developed within the framework of the unit, rather than being developed in isolation. Using the building block principle, the trainee is prepared for the topic which emphasizes language structure and grammar principles.

Under the last major topic, Basic Language Skill—Grammar Review, the study of words continues, but primary emphasis is given to uses and classifications of words as they function in sentences. The concept of grammar begins with the analysis of a simple basic sentence, to which modifiers, including words, phrases, and clauses, may be added.

It is suggested that teachers adapt the required emphases, remedial work to be done, text materials and references, programed texts and workbooks, and audio-visual materials to meet the educational background and vocational objectives of the individual trainee. The writing phase of the English language program, Business Correspondence, for example, builds on this unit and provides for continuous application of skills. Individual remedial training may be accomplished partially without seriously interfering with the group's progress. Short writing assignments should be given when the language skill topics are being presented. Thus, basic language skill and structure can be integrated to produce a capability for accurate and clear expression.

The first week should be used to develop a philosophy of communications, using language as a tool for thinking, learning, and conveying thoughts and feelings. During this first week, a film on communications may be shown. The teacher can use the film to demonstrate the pitfalls and cautions in communication and, in a sense, show that the whole of human activity involves communication.

Introduction to the spoken language should be planned for the second week, with emphasis on the importance of personal communication. Stress should be placed on informal speech—on *how* people speak rather than on *what* they say. The topic outline presents the areas of spoken communication that should be presented. Trainees should be encouraged to participate actively in discussions. Some procedure should be planned to insure that every trainee has an opportunity to speak to the group for one or two minutes. Films and tape recorders can be used effectively for voice training. Trainees who evidence speech difficulties should be enrolled in Oral Communication for remedial work.

Under the language skill topics, the trainee should develop an awareness of words and how to express thoughts. The trainee should be urged to develop a continuing habit of vocabulary enrichment by looking for new words in his daily reading and listening. The dictionary should be used consistently and efficiently. Thesauri and other reference books should also be consulted.

Presentation of spelling and interpretation of words should always be in context. Major emphasis should be placed on the ability to find correct information quickly when it is needed. Words recently learned by trainees should be used as soon as possible in writing assignments.

Sentence analysis develops the ability to recognize complete sentences, thus avoiding sentence fragments; to identify different kinds of sentences (simple, compound, and complex); and to select subjects, predicates, and modifiers.

Weekly writing assignments may be lengthened from one or a few paragraphs to letters requiring considerable organization. Revising poorly written or poorly organized letters is useful, provided that it focuses on the particular grammatical problem being studied. Rough drafts for revision or rewrite should be distributed to trainees several days before the revisions are due.

In most classes, providing for varied backgrounds will present real problems. Creative-thinking assignments may be made for the few exceptional trainees who may require little or no grammar review. Programed texts should supplement rather than replace a textbook in the review process. Constant emphasis in this unit should be placed on the applicability of the learning to the trainee's career objective. Criteria for evaluation should be high.

Standards of Achievement

1. Exhibit correct spelling and usage of words as required on objective tests.
2. Write satisfactory letters of one or two pages.
3. Demonstrate ability to use fundamentals of grammar as required on objective tests for average high school graduates.

Prerequisites for Study of Communication and Basic Language Skills

Trainee selection standards.

Topic Outline

- I. Introduction to Communication
- II. Effective Spoken Communication
- III. Basic Language Skill—Word Usage
- IV. Basic Language Skill—Grammar Review

TOPIC I. INTRODUCTION TO COMMUNICATION

- A. Definition of communication
- B. Communication—the tool for understanding
- C. Communication in business:
  1. Why it is essential
  2. Criteria for effectiveness
  3. Forms of communication used in business
- D. The importance of language skills in communication
- E. The importance of good listening

TOPIC II. EFFECTIVE SPOKEN COMMUNICATION

- A. Function and importance of spoken communication in business
- B. Elements involved in clarity of spoken language:
  1. Choice of words
  2. Tone of voice
  3. Pronunciation problems
- C. Responsibility for listening and interpreting:
  1. Posture of attention
  2. Checking understanding of the sender
  3. Facial expressions—a key to feeling and emotion—
     - a. Sender
     - b. Receiver
- D. Special problems in telephone communications
- E. Spoken communication in group discussions

TOPIC III. BASIC LANGUAGE SKILL—WORD USAGE

- A. The sentence (group of words to convey thought and feeling)
- B. Spelling words:
  1. Need for accuracy in business
  2. Words often confused
- C. The dictionary:
  1. Spelling
  2. Meaning and usages
  3. Syllabication
- D. Developing variety in writing and speech:
  1. Through reading
  2. Through employing new words in speech and writing as practice
  3. Continuing enrichment of vocabulary
- E. Precision in choosing words:
  1. Dictionary help
  2. Thesauri
- F. Practice exercises in writing and speaking

TOPIC IV. BASIC LANGUAGE SKILL-GRAMMAR REVIEW

- A. Sentence analysis and construction
- B. Verbs—regular and irregular
- C. Nouns—plurals and possessives
- D. Pronouns—cases and agreement
- E. Subjects and predicates—agreement
- F. Choice and use of adjectives
- G. Placement and function of adverbs
- H. Selection and use of prepositions
- I. Conjunctions—kinds and function
- J. Developing simple sentences into complex, compound, and complex-compound
- K. Practice writing exercises should include analysis of all preceding topics

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

American College Dictionary, The. New York: Random House.

ANDERSON, RUTH; STRAUB, LURA LYNN; AND GIBSON, E. DANA. *Word Finder, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

AUMER, ROBERT R., AND BURTNESS, PAUL S. *Effective English for Business, 5th ed.* Cincinnati: South-Western, 1962. Workbook, Achievement Tests, and Manual.

Blumenthal, Joseph C. (A series of programed texts at three levels.) *English 2200, A Programed Course in Grammar and Usage; English 2600, A Programed Course in Grammar and Usage; English 3200, A Programed Course in Grammar and Usage.* New York: Harcourt, Brace, & World, 1963.

Brown, Leland. *Communicating Facts and Ideas in Business.* Englewood Cliffs, N.J.: Prentice-Hall, 1961.

Crank, Doris; Crank, Floyd; and Connelly, Mary. *Words: Spelling, Pronunciation, Definition, and Application, 5th ed.* New York: McGraw-Hill, 1962.

Funk & Wagnall's Standard College Dictionary. New York: Harcourt, Brace, & World.

Henderson, Greta. *Business English Essentials, 3rd ed.* New York: McGraw-Hill, 1965.

Himstreet, William C.; Porter, Leonard J.; and Maxwell, Gerald W. *Business English in Communications.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

Johnson, H. Webster. *How To Use the Business Library, 3rd ed.* Cincinnati: South-Western, 1964.

Kierzek, John M., and Gibson, Walker. *Macmillan Handbook of English, 4th ed.* New York: The Macmillan Co., 1960.

Leslie, Louis A. *20,000 Words—Spelled, Divided, and Accented, 5th ed.* New York: McGraw-Hill, 1965.

Malsbary, Dean R. *Spelling and Word Power, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

Monro, Kate M., and Wittenburg, Mary Alice. *Modern Business English, 3rd ed.* New York: McGraw-Hill, 1962.

Norman, Lewis, ed. *The New Roget's Thesaurus of the English Language in Dictionary Form.* Garden City, N. Y.: Garden City Books, 1961.

Parkhurst, Charles C. *Business Communications for Better Human Relations.* Englewood Cliffs, N.J.: Prentice-Hall, 1961.

Roget, Peter M.; Roget, John L.; and Roget, Samuel R. *Roget's Thesaurus of Words and Phrases.* New York: Grosset and Dunlap.

Schutte, William M., and Steinberg, Erwin R. *Communication in Business and Industry.* New York: Holt, Rinehart, and Winston, 1960.

Shachter, Norman. *English the Easy Way, 2nd ed.* Cincinnati: South-Western, 1960. Achievement Test and Manual.

Shaw, Harry. *Spell It Right.* New York: Barnes and Noble, 1961.

Shurter, Robert L., and Williamson, J. Peter. *Written Communication in Business, 2nd ed.* New York: McGraw-Hill, 1964.

Stewart, Marie M.; Hutchinson, E. Lillian; Lanham, Frank W.; and Zimmer, Kenneth. *Business English and Communication, 2nd ed.* New York: McGraw-Hill, 1961. Workbook and Objective Tests.

Stewart, Marie M.; Lanham, Frank W.; and Zimmer, Kenneth. *College English and Communication.* New York: McGraw-Hill, 1964.

Walters, R. G., and Lamb, Marion M. *Word Studies, 5th ed.* Cincinnati: South-Western, 1963. Workbook and Manual.

Watkins, Floyd C., and Martin, Edwin T. *Practical English Handbook.* Boston: Houghton Mifflin Co., 1961.

Webster's New World Dictionary (College Edition). New York: The World Publishing Co.

Webster's Seventh New Collegiate Dictionary. Springfield, Mass.: G. and C. Meriam Co.

ORAL COMMUNICATION

Remedial or Elective Functional Requirement Unit

Hours Class: 1 hour daily   Total: Minimum 15 hours (variable)

Description and Teaching Suggestions

This unit is designed to assist those trainees who evidence speech difficulties or defects found by the teacher in the Communication and Basic Language Skills unit. Teachers should allocate time to work with each trainee in accordance with individual speech needs. The extent of after-hours trainee practice should vary as necessary. The trainee should show evidence of a gradual progression to levels of acceptable fluency as he continues in this remedial unit. Since progress in speech development may vary among trainees, some may be released from the unit earlier than others.

The topical outline forms a general guide only and should be tempered by the speech teacher's observation of the trainee's progress. Characteristic regional differences should be noted. Tape recordings of individuals' conversations and practice exercises should be used along with case study and with role playing in business situations requiring effective oral communication. Oral reports and practice exercises should be used liberally. Help with organization of individual talks should also be given to further develop trainee potential. The importance of good oral communication in the business setting, with its requirements of clarity and coherence, should be highlighted constantly.

Standards of Achievement

Acceptable speech and conversation as judged by the teacher.

Prerequisites for Study of Oral Communication

Need as determined by the teacher.

Topic Outline

I. Speech Problems
II. Elements of Good Speech
III. Development of Fluency
IV. Practice Business Conversations
V. Speaking in Meetings

TOPIC I. SPEECH PROBLEMS

A. Individual analysis
B. Correction program:
  1. Clinic
  2. After-school assignments
  3. Practice exercises

TOPIC II. ELEMENTS OF GOOD SPEECH

A. Voice:
  1. Volume
  2. Rate
  3. Pitch
  4. Tone
  5. Inflection
B. Using the voice:
  1. Pronunciation—
    a. Diacritical marks
    b. Difficult words
    c. Regional problems
  2. Enunciation
  3. Breath control
  4. Diction
  5. Animation
C. Practice exercises in above

TOPIC III. DEVELOPMENT OF FLUENCY

A. Importance of fluency
B. Importance of word choice
C. Using language:
  1. Expanding vocabulary
  2. Eliminating slang
  3. Using correct grammar
  4. Developing units of thought
  5. Organizing oral presentations
D. Practice exercises in above

TOPIC IV. PRACTICE BUSINESS CONVERSATIONS

NOTE: Dual and multiple role playing should be used to simulate office conditions of conversation.

A. The role of the listener:
  1. Participating with speaker
  2. Questioning
  3. Interpreting
  4. Indicating interest
B. The role of the speaker:
  1. Organizing talk
  2. Evidencing clarity and coherence
  3. Stating facts and details accurately
  4. Speaker attitudes toward listener

TOPIC V. SPEAKING IN MEETINGS

A. Types of meetings
B. Understanding purpose or objective
C. Participating actively when appropriate
D. Recognizing others
E. Stating conclusions
F. Practice in speaking in group meetings

Texts and Other Teaching Materials

Selection of appropriate materials for this course will vary depending on trainee problems and the teacher's familiarity with speech correction. Several good tape recorders should be available for the classroom.

BAIRD, A. CRAIG, AND KNOWER, FRANKLIN H. *Essentials of General Speech, 2nd ed.* New York: McGraw-Hill, 1960.

HIMSTREET, WILLIAM C.; PORTER, LEONARD J.; AND MAXWELL, GERALD W. *Business English in Communications.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

THOMPSON, WAYNE, AND FESSENDEN, SETH. *Basic Experiences in Speech, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1958.

ACCELERATED READING

Basic Skill for All Stenographers and Secretaries

Hours Class: 1 hour daily

Total: 50 hours variable

Description and Teaching Suggestions

This skill unit will increase the trainee's reading ability, enabling him to comprehend business and technical materials more rapidly. An efficient stenographic or secretarial worker should be able to process written materials with maximum speed and accuracy. Increased reading skill is one of the key factors in achieving this goal. Stress will be placed on visual discrimination, development of comprehension, and rapid reading techniques. Each trainee should enter the program with at least a 10th-grade reading level as measured by the Davis Reading Test, Forms 2A, 2B, 2C, or 2D. Trainees not at that level should receive a pre-unit remedial reading course to bring them to that level. Trainees will receive group instruction and will work with individualized materials so that each may proceed in accordance with his own natural ability.

Standards of Achievement

Reading at 12th-grade level, as measured by the Davis Reading Test, Forms 1A, 1B, 1C, or 1D, plus a special proficiency in one or more of the following areas:

Correspondence
General business literature
Legal material
Medical reports
Scientific reports
Engineering data

At present, there are no standard tests of achievement in the above categories. Thus, reading instructors should develop specialized measuring tools to determine the degree of achievement attained by the trainee.

Prerequisites for Study of Accelerated Reading

10th-grade reading level.

Topic Outline

I. Visual Discrimination
II. Fundamental Approach to Reading
III. Vocabulary Development
IV. Sentence and Paragraph Comprehension
V. Comprehension of Longer Selections
VI. Accelerating Reading
VII. Practical Applications

TOPIC I. VISUAL DISCRIMINATION

A. Tachistoscopic training:
  1. Numbers
  2. Words
  3. Phrases
B. Practical applications to business correspondence

TOPIC II. FUNDAMENTAL APPROACH TO READING

A. Need for flexibility
B. Surveying
C. Skimming
D. Scanning
E. SQ3R method (Survey, Question, Read, Review, Recite)

TOPIC III. VOCABULARY DEVELOPMENT

A. Learning words in context
B. Using the dictionary
C. Word roots
D. How to be "word aware" in everyday life
E. Building vocabulary artificially through special texts

TOPIC IV. SENTENCE AND PARAGRAPH COMPREHENSION

A. Structure of a sentence
B. Structure of a paragraph

TOPIC V. COMPREHENSION OF LONGER SELECTIONS

A. Determining author's purpose and general tone
B. Recognizing and understanding the writer's organization
C. Finding main ideas
D. Finding supporting details
E. Following written directions
F. Relating ideas, drawing inferences, and reading between the lines

TOPIC VI. ACCELERATING READING

A. Understanding factors that control speed:
  1. Difficulty of the material
  2. Purpose of the reader
  3. Intelligence
  4. Span of apprehension
  5. Concentration
  6. Mechanical factors (orderly left-to-right progression, accurate perception, etc.)
B. Rate-controller training
C. Timed exercises
D. Pacer training

TOPIC VII. PRACTICAL APPLICATIONS

A. Applications to general reading
B. Applications to specific secretarial areas

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select teacher materials for use in this unit. Additional materials are listed in Appendix D.

BLAIR, GLENN. *Diagnostic and Remedial Teaching*. New York: Macmillan, 1956.

BOND, GUY, AND TINKER, MILES. *Reading Difficulties, Their Diagnosis and Correction*. New York: Appleton-Century-Crofts, 1957.

FLESCH, RUDOLPH. *The Art of Readable Writing*. New York: Harper & Bros., 1949.

JEWETT, ARNO. *Improving Reading in the Junior High School. (Bulletin No. 10.)*. Washington: U.S. Department of Health, Education, and Welfare, 1957.

KOTTMEYER, WILLIAM. *Teacher's Guide for Remedial Reading*. New York: McGraw-Hill, 1959.

Newton, J. Roy. *Reading In Your School.* New York: McGraw-Hill, 1960.

Strang, Ruth, and Bracken, Dorothy. *Making Better Readers.* Boston: D. C. Heath and Co., 1957.

Strang, Ruth; McCullough, Constance; and Traxler, Arthur. *The Improvement of Reading, 3rd ed.* New York: McGraw-Hill, 1961.

Mechanical Aids

AVR Rateometer. Audio-Visual Research, Chicago. A device for improving reading speed.

Controlled Reader. Educational Developmental Laboratories, Inc., Huntington, N. Y. A machine which uses filmstrips for improvement of reading (readiness period through fault level).

Keystone Tachistoscope. Keystone View Company, Meadville, Pa. A device for presenting digits, phrases, sentences, affixes, etc., (timed or untimed), by use of slides.

Leavell Hand-Eye Coordinator. Keystone View Company, Meadville, Pa. Offers training in hand-eye coordination.

Perceptascope. Perceptual Development Laboratories, St. Louis. Combines training with films and training in tachistoscopic techniques.

Reading Pacer. Keystone View Company, Meadville, Pa. A device for improving reading speed.

Reading Rate Controller. Stereo Optical Company, Chicago. A device for improving reading speed.

Renshaw Tachistoscopic Trainer. Stereo Optical Company, Chicago. An individual tachistoscope.

Shadowscope Reading Pacer. Lafayette Instrument Company, Lafayette, Ind. A device for improving reading speed.

SRA Reading Accelerator, Model II. Science Research Associates, Chicago. A device for improving reading speed.

Timex. Educational Developmental Laboratories, Inc., Huntington, N. Y. A tachistoscopic device.

BUSINESS CORRESPONDENCE

Basic Skill for Secretaries

Hours Class: 1 hour daily

Total: 30 hours

Description and Teaching Suggestions

Since many secretaries prepare letters for approval by their employer or supervisor, answer routine correspondence, and write letters for a variety of purposes, this unit was designed to help all secretarial trainees with this skill.

The purpose of the unit is to help the trainee to develop writing skill and to familiarize him with typical business writing. The first goal includes developing a forceful and pleasing style as well as grammatical correctness. Achieving the second goal requires some knowledge of business practices and relationships. In addition to applying the basic language skills learned in the Communication and Basic Language Skills unit, trainees should be introduced to current trends in business writing, specific techniques for developing a readable style, and the fundamentals of organizing written materials.

Some aspects that should be reviewed are format, letterhead design and paper selection, punctuation and capitalization, and continuing vocabulary development.

Developing an effective writing style is probably learned best by a combination of activities, such as analyzing successful business writing, composing original letters, studying the feedback after evaluation, revising and rewriting, and repeated application of techniques that have proved successful.

All writing assignments should be typewritten. Bulletin boards should be used to display various letterheads, enlarged posters of letter styles, and outstanding compositions. Trainees mastering this unit may also be eligible to pursue corresponding related work activities. Assessment of the trainee's achievement in this unit is qualitative, based on the judgment of the teacher.

Standards of Achievement

Organize and compose acceptable business correspondence in accordance with current business letter writing practice.

Prerequisites for Study of Business Correspondence

Communication and Basic Language Skills.

Topic Outline

I. Elements of Letter Organization
II. Letter Style
III. Special Purpose Letters
IV. Application for Employment
V. Intracompany Correspondence

Note: Each sub-topic should be followed by exercises in original letter writing with teacher-trainee feedback, and rewriting of letters by the trainee for resubmission.

TOPIC I. ELEMENTS OF LETTER ORGANIZATION

- A. Developing unified and coherent paragraphs
- B. Developing conciseness in writing letters of request:
  - 1. Hotel reservations
  - 2. Travel schedules
  - 3. Literature requests
  - 4. General and/or specific information
- C. Developing completeness and accuracy:
  - 1. Maintenance of conciseness
  - 2. Letters of request—
    - a. Requisitioning supplies
    - b. Ordering merchandise
    - c. Requesting credit
    - d. Requesting a favor

TOPIC II. LETTER STYLE

- A. Pleasant and persuasive tone
- B. Descriptive style:
  - 1. Vivid
  - 2. Concrete
- C. Letters to build good will:
  - 1. Thanks
  - 2. Congratulations
  - 3. Sympathy
  - 4. Appreciation
  - 5. Granting a favor
  - 6. Formal letters with deferential tone to important person
  - 7. Recommendations for employment

TOPIC III. SPECIAL PURPOSE LETTERS

- A. Letters that sell merchandise or service
  - 1. Organization to lead the reader to action
  - 2. Maintenance of previously developed style
- B. Letters containing negative material or rejection:
  - 1. Maintenance of positive tone
  - 2. Awareness of reader reaction
  - 3. Saying "No" graciously

TOPIC IV. APPLICATION FOR EMPLOYMENT

- A. Inquiring about an open position
- B. Applying for a specific position

TOPIC V. INTRACOMPANY CORRESPONDENCE

- A. Informal memoranda for staff members:
  - 1. Brief
  - 2. Concise
  - 3. Courteous
- B. Writing for the record:
  - 1. Formal and impersonal style
  - 2. Minutes of meetings
  - 3. Orders to subordinate personnel

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AURNER, DR. ROBERT R., AND BURTNESS, DR. PAUL S. *Effective English for Business, 5th ed.* Cincinnati: South-Western, 1962. Workbook, Achievement Tests, and Manual.

DORIS, LILLIAN, AND MILLER, BESSE M. *Complete Secretary's Handbook, 2nd ed. rev.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

FOWLER, H. W. *A Dictionary of Modern English Usage.* New York: Oxford University Press.

GAVIN, RUTH E., AND HUTCHINSON, E. LILLIAN. *Reference Manual for Stenographers and Typists, 3rd ed.* New York: McGraw-Hill, 1961.

HIMSTREET, WILLIAM C.; PORTER, LEONARD J.; AND MAXWELL, GERALD W. *Business English in Communications.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

HODGES, JOHN C., AND CONNOLLY, FRANCIS X. *Harbrace College Handbook, 5th ed.* New York: Harcourt, Brace, & World, 1962.

HOUSE, CLIFFORD R., AND SKUROW, SAMUEL. *Typewriting Style Manual.* Cincinnati: South-Western, 1963.

LARSON, LENNA A., AND KOEBELE, APOLLONIA M. *Reference Manual for Office Employees, 4th ed.* Cincinnati: South-Western, 1960.

MAYO, LUCY G. *Communications Handbook for Secretaries.* New York: McGraw-Hill, 1958.

MENNING, J. H., AND WILKINSON, C. W. *Communication Through Letters and Reports, 3rd ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1963.

SHURTER, R. L., AND WILLIAMSON, J. P. *Written Communication in Business, 2nd ed.* New York: McGraw-Hill, 1964.

WYKOFF, GEORGE S., AND SHAW, HARRY. *Harper Handbook of College Composition, 3rd ed.* New York: Harper and Bros., 1962.

BUSINESS PRINCIPLES AND ORGANIZATION

Environmental Knowledge for Stenographers and Secretaries

Hours Class: 2 hours daily　　Total: 60 hours

Description and Teaching Suggestions

This unit should help the trainee to understand the role of the American business system, its organization, and some basic management principles. The content is designed to give the trainee an awareness of his job relative to others in a business complex. The role and importance of marketing in our business system is investigated.

Trainees should become aware of the complexities of today's business environment and understand business decisions guidelines such as profit, costs, overhead, and general and administrative expense. The various marketing functions should be thoroughly explored since many secretarial trainees may find employment in these areas.

The unit also emphasizes the financial, production, and personnel management areas of business enterprise. The role of government in business is studied intensively. It is suggested that local business controllers, production, and personnel managers be invited to speak to the group about their areas of interest. Class discussion should be encouraged. Objective tests can be used to evaluate the trainee's general business knowledge.

Standards of Achievement

1. Know the types of organizations in the American business system.
2. Know the general patterns of operation and the general responsibilities of management for profitable production.
3. Identify and know the various marketing functions and the effect of various social and economic factors on marketing.
4. Know the purposes and contribution to the business enterprise of the areas of financial, production, and personnel management.
5. Know some of the effects of certain legislation on business practices.

Prerequisites for Study of Business Principles and Organization

Trainee selection standards.

Topic Outline

I. Understanding the American Business System
II. Organization of Business
III. Principles of Management
IV. Marketing and Merchandising Management
V. Financial Management
VI. Production Management
VII. Personnel and Human Relations
VIII. Government and Business

TOPIC I. UNDERSTANDING THE AMERICAN BUSINESS SYSTEM

A. The profit motive
B. Big and small business
C. Interdependency and specialization
D. The business system in a democratic society
E. Governmental influence (will be covered more extensively later)

TOPIC II. ORGANIZATION OF BUSINESS

A. Sole proprietorship
B. Partnership
C. Corporation
D. Cooperatives

TOPIC III. PRINCIPLES OF MANAGEMENT

A. Overall responsibilities of management
B. Organization of management
C. Patterns of operation
  1. Planning
  2. Organizing
  3. Directing
  4. Integrating
  5. Controlling
D. Executives responsible for management functions

TOPIC IV. MARKETING AND MERCHANDISING MANAGEMENT

A. Role of marketing in our business system
B. Importance and growth of marketing
C. Factors affecting marketing activities:
  1. Population trends
  2. Income
  3. Location
  4. Style
  5. Fashion
D. Marketing research as an important function of marketing
E. Channels of distribution:
  1. Wholesalers
  2. Agents and brokers
  3. Retailers
F. Marketing activities:
  1. Buying
  2. Pricing
  3. Selling
G. Merchandising activities:
  1. Promotion-advertising and display
  2. Delivery and shipping

TOPIC V. FINANCIAL MANAGEMENT

A. Executives and financial responsibility
B. Common financial decisions
C. Areas of financial management:
  1. Financial accounting
  2. Determination of profits
  3. Determination and control of costs

4. Budgeting
5. Taxes and their impact on business
6. Investments
7. Risks and insurance
8. Credit and collections

TOPIC VI. PRODUCTION MANAGEMENT

A. Executives and departmental responsibilities
B. Planning production
C. Production control and measurement
D. Factors of production

TOPIC VII. PERSONNEL AND HUMAN RELATIONS

A. Executives and departmental responsibilities
B. Recruitment and selection
C. Employee training
D. Employee incentives:
   1. Financial
   2. Non-financial
E. Employer-employee relations
F. Office organization and management

TOPIC VIII. GOVERNMENT AND BUSINESS

A. Important areas of government legislation:
   1. Prices
   2. Business practices
   3. Fluctuations in economy
B. Encouragement of business activity

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Crabbe, Ernest H.; DeBrum, S. Joseph; and Haines, Peter G. *General Business, 9th ed.* Cincinnati: South-Western, 1966. Workbooks, Achievement Tests, and Manual.

Hurley, Morris L. *Business Administration, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Nanassy, Louis C., and Fancher, Charles M. *General Business and Economic Understandings, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1967.

Price, Ray G.; Musselman, Vernon A.; Hall, J. Curtis; and Weeks, Edwin. *General Business for Everyday Living, 3rd ed.* New York: McGraw-Hill, 1966.

Robinson, [illegible]in, and Hall, J. Curtis. *College Business Organization and Management, 3rd ed.* New York: McGraw-Hill, 1964.

Shilt, Bernard A., and Wilson, W. Harmon. *Business Principles and Management, 4th ed.* Cincinnati: South-Western, 1961.

Tonne, Herbert A.; Simon, Sidney I.; and McGill, Esby C. *Business Principles, Organization and Management, 2nd ed.* New York: McGraw-Hill, 1963.

Weimer, Arthur M. *Introduction to Business: A Management Approach.* Homewood, Ill.: Richard D. Irwin, Inc., 1959.

Wingate, John W., and Weiner, J. Dana. *Retail Merchandising, 6th ed.* Cincinnati: South-Western, 1963. Workbook, Achievement Tests, and Manual.

BUSINESS TERMINOLOGY

Environmental Knowledge for Stenographers and Secretaries

Hours Class: 1 hour daily — Total: 15 hours

Description and Teaching Suggestions

This unit covers the terminology used in business. Emphasis is placed on *functional application* of the terminology, rather than on mere definitions. The trainee should know when, where, and how business terms are used. The unit can accelerate learning in other environmental knowledge units. As each topic is covered, it is suggested that the teacher assign selected short readings in business areas. Because the instruction in this unit will have application in the skill development and functional requirement training units, trainees should be encouraged to use standard and special dictionaries frequently, and to compose short paragraphs using the newly learned terminology. Evaluation of trainee achievement can be made by objective tests.

Standards of Achievement

Understand, define, and use business terminology from a wide variety of business fields as measured by achievement on objective type tests (90 percent or better).

Prerequisites for Study of Business Terminology

Trainee selection standards.

Topic Outline

I. Business Organization
II. Production

III. Marketing
IV. Banking
V. Credit
VI. Business Cycles
VII. Labor
VIII. Taxes
IX. Investment
X. Automation
XI. Business Law
XII. Insurance
XIII. Finance

TOPIC I. BUSINESS ORGANIZATION

A. Proprietorship
B. Partnership
C. Corporation
  1. Bonds
  2. Stocks
  3. Dividends
D. Cooperatives

TOPIC II. PRODUCTION

A. Capital investment
B. Productivity
C. Purchasing
D. Inventory
E. Quality control
F. Producer's goods

TOPIC III. MARKETING

A. Distribution
B. Sales
C. Costs
D. Transportation
E. Consumption
F. Consumer price index

TOPIC IV. BANKING

A. Currency
B. Time deposits
C. Demand deposits
D. Savings
E. Reserves
F. Loans

TOPIC V. CREDIT

A. Debtor
B. Creditor
C. Installments
D. Interest
E. Credit rating
F. Credit bureau
G. Credit memorandum

TOPIC VI. BUSINESS CYCLES

A. Prosperity
B. Depression
C. Recession
D. Recovery
E. Inflation
F. Deflation
G. Gross national product

TOPIC VII. LABOR

A. Collective bargaining
B. Labor force
C. Mediator
D. Arbitrator
E. Strike
F. Union

TOPIC VIII. TAXES

A. Corporation taxes
B. Excise taxes
C. Tax rate
D. Tax base
E. Progressive tax
F. Regressive tax
G. Proportional tax
H. Tariffs
I. FICA

TOPIC IX. INVESTMENT

A. Common stock
B. Preferred stock
C. Debenture bond
D. Registered bond
E. Mutual funds
F. Stock market

TOPIC X. AUTOMATION

A. Data processing
B. Technology
C. Computer
  1. Analog
  2. Digital
D. Input
E. Output
F. Feedback
G. Programmer
H. Systems

TOPIC XI. BUSINESS LAW

A. Contracts
B. Negotiable instruments:
  1. Drafts
  2. Promissory notes
  3. Trade acceptances
  4. Indorsements—
    a. Special
    b. Blank

        c. Restrictive
        d. Qualified
    C. Principal
    D. Agent
    E. Real property:
        1. Mortgage
        2. Deed
        3. Lease
    F. Warranties

TOPIC XII. INSURANCE

    A. Policy
    B. Premium
    C. Face value
    D. Risk
    E. Liability

TOPIC XIII. FINANCE

    A. Revenue
    B. Expenditure
    C. Assets
    D. Liabilities
    E. Capital
    F. Net worth
    G. Balance Sheet
    H. Income and expense statement

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Archer, Fred; Brecker, Raymond; and Frakes, John. *General Office Practice, 2nd ed.* New York: McGraw-Hill, 1963.

Campise, James A., and Wagoner, Max L. *The ABC's of ADP.* Park Ridge, Ill.: Data Processing Management Association, 1964.

Crabbe, Ernest H.; DeBrum, S. Joseph; and Haines, Peter G. *General Business, 9th ed.* Cincinnati: South-Western, 1966. Workbooks, Achievement Tests, and Manual.

Crank, Doris; Crank, Floyd; and Connelly, Mary. *Words: Spelling, Pronunciation, Definitions, and Application, 5th ed.* New York: McGraw-Hill, 1962.

Dodd, James Harvey; Kennedy, John W.; and Olsen, Arthur R. *Applied Economics, 6th ed.* Cincinnati: South-Western, 1962. Workbook, Achievement Tests, Examinations, and Manual.

Ellsworth, Phil, and Jackson, Paul. *Applied Bookkeeping, 4th ed.* New York: McGraw-Hill, 1965.

Fisk, McKee, and Snapp, James C. *Applied Business Law, 9th ed.* Cincinnati: South-Western, 1966.

Gavin, Ruth E., and Hutchinson, Lillian E. *Reference Manual for Stenographers and Typists, 3rd ed.* New York: McGraw-Hill, 1961.

Getz, George. *Business Law, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

Huffman, Harry; Mulkerne, Donald; and Russon, Allien. *Office Procedures and Administration, College Course.* New York: McGraw-Hill, 1965.

Kahn, Gilbert. *Business Data Processing, Basic Principles and Applications.* New York: McGraw-Hill, 1966.

Laird, Donald, and Laird, Eleanor. *Practical Business Psychology, 3rd ed.* New York: McGraw-Hill, 1961.

Lamb, Marion M. *Word Studies, 5th ed.* Cincinnati: South-Western, 1963. Workbook, Achievement Tests, and Manual.

Larson, Lenna A., and Koebele, Apollonia. *Reference Manual for Office Employees, 4th ed.* Cincinnati: South-Western, 1960.

Maisbary, Dean R. *Spelling and Word Power, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

Martin, E. Wainright. *Electronic Data Processing—An Introduction.* Homewood, Ill.: Richard D. Irwin, Inc., 1961.

McNaughton, W. L. *Introduction to Business Enterprise.* New York: John Wiley and Sons, 1960.

Nanassy, Louis C., and Selden, William. *Business Dictionary.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Place, Irene, and Hicks, Charles. *College Secretarial Procedures, 3rd ed.* New York: McGraw-Hill, 1964.

Price, Ray G., and others. *General Business for Everyday Living, 3rd ed.* New York: McGraw-Hill, 1966.

Robichaud, Beryl. *Understanding Modern Business Data Processing.* New York: McGraw-Hill, 1966.

Rosenberg, R. Robert, and Crank, Floyd. *Essentials of Business Law, 3rd ed.* New York: McGraw-Hill, 1963.

Schmidt, Richard N., and Meyers, William E. *Electronic Business Data Processing.* New York: Holt, Rinehart, and Winston, 1963.

Shilt, Bernard A., and Wilson, W. Harmon. *Business Principles and Management, 4th ed.* Cincinnati: South-Western, 1961. Workbook, Achievement Tests, and Manual.

Tonne, Herbert E.; Simon, Sidney I.; and McGill, E. C. *Business Principles, Organization and Management.* New York: McGraw-Hill, 1963.

Wanous, S. J., and Wanous, Edward E. *Dictionary of Bookkeeping and Accounting Terminology.* Cincinnati: South-Western, 1962.

———. *Automation Office Practice.* Cincinnati: South-Western, 1964. Automation Office Practice Set and Manual.

Wingate, John W., and Weiner, J. Dana. *Retail Merchandising, 6th ed.* Cincinnati: South-Western, 1963. Workbook, Achievement Tests, and Manual.

A standard dictionary is also suggested, such as *The American College Dictionary,* New York: Random House, or *Webster's New Collegiate Dictionary,* Springfield, Mass.: G. and C. Merriam Co.

FUNDAMENTALS OF BUSINESS LAW

Functional Requirement for All Trainees

Hours Class: 1 hour daily Total: 30 hours

Description and Teaching Suggestions

This unit provides an introduction to the common legal principles pertaining to everyday business activities. It should introduce the office worker to the essential elements of contracts, negotiable instruments, and sales transactions. Designed as a foundation unit, it can serve as preliminary preparation for trainees to enter the business world with some perception of the legal rights and obligations of parties to business agreements. The unit exposes trainees who are preparing for careers in legal office work to terminology, concepts, and practices which they will study more intensively at a later time. Discussion by the trainees should be encouraged. Personal experiences can often be used effectively to create a lively discussion. Actual cases should be used liberally to give realism to the presentation. Evaluation of the trainee's knowledge can be made by objective tests.

Standards of Achievement

1. Know the effect of legislation on business practice
2. Know the elements of contracts, sales transactions, and negotiable instruments
3. Understand legal relationships such as those between employer and employee, debtors and creditors, government and business, and landlord and tenants

Prerequisites for Study of Fundamentals of Business Law

Trainee selection standards.

Topic Outline

I. Importance of Law to Business
II. Common Legal Forms
III. Contracts
IV. Sales Transactions
V. Negotiable Instruments (Notes, Checks, Drafts)
VI. Legal Relationships

TOPIC I. IMPORTANCE OF LAW TO BUSINESS

A. Purpose of laws
B. Effects of legislation on business practices:
    1. Control of business
    2. Regulation of business

TOPIC II. COMMON LEGAL FORMS

A. Acknowledgment
B. Power of attorney
C. Proxy
D. Affidavit

TOPIC III. CONTRACTS

A. The nature of a contract
B. Implied contracts
C. Written contracts
D. Uniform commercial code

TOPIC IV. SALES TRANSACTIONS

A. What constitutes a sales contract
B. Transfer of title
C. Conditional sales contracts
D. Expressed and implied warranties
E. Rights and remedies

TOPIC V. NEGOTIABLE INSTRUMENTS (NOTES, CHECKS, DRAFTS)

A. What makes a paper negotiable
B. Form and content of negotiable instruments
C. Transfer of negotiable instruments:
    1. Form of endorsements
    2. Responsibilities of endorsers

TOPIC VI. LEGAL RELATIONSHIPS

A. Legal rights:
    1. Employer and employee
    2. Creditors and debtors
    3. Landlord and tenant
    4. Government and business
B. Legal duties:
    1. Employer and employee
    2. Creditors and debtors
    3. Landlord and tenant
    4. Government and business

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

ANDERSON, RONALD A. *Uniform Commercial Code Teaching Guide*. Cincinnati: South-Western, 1964. Teacher's Book.

Fisk, McKee, and Snapp, James C. *Applied Business Law, 9th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, Examinations, and Manual.

Getz, George. *Business Law, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

Goodman, Kennard E. *Today's Business Law, 2nd ed.* New York: Pitman, 1961.

Miller, Besse May. *Legal Secretary's Complete Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Rosenberg, R. Robert, and Ott, William G. *College Business Law, 3rd ed.* New York: McGraw-Hill, 1966. Tests, Teacher's Manual, and Key.

Schneider, Arnold E.; Smith, Edward A.; and Whitcraft, John E. *Personal Business Law, 3rd ed.* New York: McGraw-Hill, 1963. Workbook, Tests, Teacher's Manual, and Key.

Sletwold, Evangeline. *Sletwold's Manual of Documents and Forms for the Legal Secretary.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

INTRODUCTION TO BUSINESS DATA PROCESSING

Environmental Knowledge for Secretaries

Hours Class: 1 hour daily — Total: 30 hours

Description and Teaching Suggestions

Much of today's business activities center around automated data processing and associated equipment. This unit is designed to help the trainee understand the office environment in which automated data equipment is used, exposing him to the associated terminology, processes, and effects. Primarily, the unit presents an overview of data processing, possible applications, preparation of input, and automated equipment and processes. It is suggested that teachers provide for a trainee tour of an automated data-processing office. U. S. Office of Education publication OE–86010. *Suggested Curricula Guide for Electronic Business Data Processing Peripheral Equipment Occupations* should be consulted for references and materials available in the business data-processing field. Objective tests of knowledge acquired in business data-processing fundamentals are suggested for evaluating trainees.

Standards of Achievement

Know fundamentals of data-processing as evidenced on objective tests of factual material presented.

Prerequisites for Study of Introduction to Business Data Processing

General Office Education Units as suggested for the Basic Stenographic-Secretarial program.

Demonstrated proficiencies equivalent to standards of achievements for those units are acceptable.

Topic Outline

I. Importance and Uses of Data
II. Evolution and Growth of Data-Processing Systems
III. Applications of Data Processing
IV. Basic Data Processing Cycle
V. Input-Output Data Representation
VI. Introduction to Systems and Equipment
VII. Peripheral Business Data-Processing Occupations

TOPIC I. IMPORTANCE AND USES OF DATA

A. History of record-keeping
B. Sources and types of data
C. Needs for data
D. Decisions based on data
E. Growing complexity of data

TOPIC II. EVOLUTION AND GROWTH OF DATA-PROCESSING SYSTEMS

A. Definition of terms; data, data processing, technology, automation, etc.
B. Evolution of data-processing systems:
   1. Early one-man businesses (simple bookkeeping)
   2. Expansion of business and increasing need for data
   3. Early mechanization of the recordkeeping process
   4. Development of office machines
   5. Development of punched card systems
   6. Integrated data processing
   7. Electronic data-processing systems
   8. Future of data processing
C. Data processing in the business organization
D. Filing techniques review:
   1. Alphabetic files
   2. Numeric files

   3. Subject files
   4. Other types of files—chronological, geographical, etc.

TOPIC III. APPLICATIONS OF DATA PROCESSING

A. Engineering
B. Science
C. Statistics
D. Military
E. Financial and banking
F. Business and industry:
   1. Accounting
   2. Payroll
   3. Reports
   4. Inventory and material control
   5. Production scheduling
   6. Labor distribution
   7. Sales analysis
   8. Market forecasting
   9. Management forecasting

TOPIC IV. BASIC DATA PROCESSING CYCLE

A. Collection of data (original documents, checks, time cards, etc.)
B. Input preparation and entry (preparing ledger pages, punching cards, etc.)
C. Processing:
   1. Classifying (by location, production lot, etc.)
   2. Sorting (by code, account number, etc.)
   3. Calculating (total volume, averages, deductions, etc.)
   4. Summarizing (new or reconstructed data)
D. Storage (machine memory, library, paper files)
E. Output (punched cards, magnetic tape, document, statement)

TOPIC V. INPUT-OUTPUT DATA REPRESENTATION

A. Recording media:
   1. Punched card
   2. Punched paper tape
   3. Magnetic tape
   4. Magnetic ink characters
   5. Printed form
   6. Cathode-ray tube
   7. Other media
B. Coding systems (man-machine communication)

TOPIC VI. INTRODUCTION TO SYSTEMS AND EQUIPMENT

A. Manual systems
B. Machines:
   1. Typewriters
   2. Reproducing machines
   3. Calculators
   4. Accounting machines
   5. Key sorts
C. Electro-mechanical machines (functions and types):
   1. Key-punches
   2. Verifiers
   3. Reproducers
   4. Collators
   5. Sorters
   6. Interpreters
   7. Calculators
   8. Tabulators
   9. Media converters (tape to card, card to tape)
D. Electronic computers

TOPIC VII. PERIPHERAL BUSINESS DATA-PROCESSING OCCUPATIONS

A. Job functions and associated equipment
   1. Tape librarian
   2. Coding clerk
   3. Key-punch operator
   4. Tabulating machine operator
   5. Console operator
   6. Supervisor, machine records unit
   7. Supervisor, clerical
   8. Statistical clerk
   9. Possible future occupation—peripheral equipment operator
B. Importance of peripheral business data-processing occupations

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Bassett, Ernest D.; Agnew, Peter L.; and Goodman, David G. *Business Filing and Records Control, 3rd ed.* Cincinnati: South-Western, 1964. Filing Office Practice Set, Final Examination, Placement Tests, and Manual.

Chapin, Ned. *Introduction to Automatic Computers.* Princeton, N.J.: D. Van Nostrand Co., 1964.

Freeman, M. Herbert; Hanna, J. Marshall; and Kahn, Gilbert. *Gregg Bookkeeping and Accounting, 3rd ed.* New York: McGraw-Hill, 1963. (Contains special section on business data processing.)

Griffith, Mary Claire. *Records Management.* Boston: Allyn and Bacon, 1964.

Hein, Leonard W. *An Introduction to Electronic Data Processing for Business.* Princeton, N. J.: D. Van Nostrand Co., 1961.

Huffman, Harry; Mulkerne, Donald J. D.; and Russon,

ALLIEN. *Office Procedures and Administration.* New York: McGraw-Hill, 1965.

INMAN, KENNETH L. *Fundamentals of Electronic Data Processing (A Programmed Text).* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

Introduction to Electronic Data Processing. Park Ridge, Ill.: Data Processing Management Association, 1962. Teacher's Manual and Student's Kit.

JOHNSON, H. WEBSTER. *How To Use the Business Library, 3rd ed.* Cincinnati: South-Western, 1964.

KAHN, GILBERT. *Business Data Processing, Basic Principles and Applications.* New York: McGraw-Hill, 1966.

KAHN, GILBERT; YERIAN, THEODORE; AND STEWART, JEFFREY R. *Progressive Filing.* New York: McGraw-Hill, 1961. Workbook, Practice Set, Instructor's Manual, and Tests.

MCGILL, DONALD A. C. *Punched Cards: Data Processing for Profit Improvement.* New York: McGraw-Hill, 1962.

ROBICHAUD, BERYL. *Understanding Modern Business Data Processing.* New York: McGraw-Hill, 1966. Problems and Exercises, Teacher's Manual, and Key.

VAN NESS, ROBERT G. *Principles of Punched Card Data Processing.* Elmhurst, Ill.: The Business Press, 1962. (Secondary School Edition available also) Teacher's Manual.

WANOUS, S. J., AND WANOUS, EDWARD E. *Automation Office Practice.* Cincinnati: South-Western, 1964. Automation Office Practice Set, and Manual.

WANOUS, S. J.; WANOUS, EDWARD E.; AND HUGHES, ART. *Introduction to Automated Data Processing.* Cincinnati: South-Western, 1967.

ECONOMICS AND INTERNATIONAL TRADE

Functional Requirement for Foreign-Language Stenographers and Secretaries and Environmental Knowledge for Secretaries

Hours **Class: 1 hour daily** **Total: 30 hours**

Description and Teaching Suggestions

This unit presents an overall view of our economic system and explores the economic differences which underlie world trade. The role of business in the economic system is highlighted. Relationships between the worker and the economic system are presented to give trainees insight into some of the complexities. The principle of specialization and how specialization contributes to the interdependence of nations are studied and related to our economic system. Export-import trade is studied. This topic should be especially useful to trainees whose career objectives are in the foreign-language secretarial field. If possible, an exporter or importer in the community should be invited to lecture on some of the foreign-trade practices with which secretaries are involved. Other areas of international trade and transactions which should be useful to this group are currency and monetary problems, travel arrangements for executives (visas, customs procedures, etc.), trade tariffs, and private capital investments. Continuous emphasis should be given to increased travel by executives to other countries, and the importance of international trade. Objective tests can be used to evaluate trainees.

Standards of Achievement

1. Know major aspects of the American economic system as judged by objective tests of factual material presented in the unit.
2. Know principles and problems of international trade.
3. Know export-import aspects of international trade as measured by test.
4. Know passport and other travel arrangement procedures.

Prerequisites for Study of Economics and International Trade

General Office Education Units as suggested for the Basic Stenographic-Secretarial Program.

Demonstrated proficiencies equivalent to standards of achievement for these units are acceptable.

Topic Outline

I. Functions of an Economic System
II. Business and Our Economic System
III. The Worker and Our Economic System
IV. The Consumer and Our Economic System
V. Government and Our Economic System
VI. The Nature of World Trade
VII. America's Role in World Trade
VIII. Trade Barriers and Trade Policies
IX. International Monetary Problems
X. Import-Export Procedures
XI. International Travel for Executives

TOPIC I. FUNCTIONS OF AN ECONOMIC SYSTEM

A. What is an economic system

B. Production of goods by business
C. Distribution of goods in markets
D. Allocation of resources for production of goods and services
E. Provision of income and employment

TOPIC II. BUSINESS AND OUR ECONOMIC SYSTEM

A. Characteristics of our free enterprise system:
  1. Private enterprise
  2. Profits
  3. Competition
  4. Interdependence
  5. Fluctuations in business activity
B. Measuring the performance of our free enterprise system:
  1. How our economy has grown
  2. Why our economy has grown
  3. The problem of maintaining economic growth

TOPIC III. THE WORKER AND OUR ECONOMIC SYSTEM

A. Our labor force:
  1. Composition of the labor force
  2. Changing occupations
  3. Automation and opportunities for employment
B. Labor unions:
  1. Why workers organize
  2. How collective bargaining works
  3. The nature of a labor contract
  4. The importance of labor unions
C. Labor-management relations:
  1. Labor-management issues
  2. The use of the strike
  3. Public concern for labor-management relations

TOPIC IV. THE CONSUMER AND OUR ECONOMIC SYSTEM

A. The role of the consumer in a free enterprise system
B. Personal expenditures
C. Effective use of credit
D. Services of banks
E. Personal financial security:
  1. Savings and investing
  2. Insurance

TOPIC V. GOVERNMENT AND OUR ECONOMIC SYSTEM

A. The role of government:
  1. Economic functions of government
  2. Government aids to business
B. Sharing the cost of government
C. Our tax system

TOPIC VI. THE NATURE OF WORLD TRADE

A. World trade defined
B. Why world trade takes place:
  1. Principle of specialization
  2. Principle of comparative advantage
  3. Advantages of trade
C. Domestic and international trade:
  1. Similarities
  2. Differences

TOPIC VII. AMERICA'S ROLE IN WORLD TRADE

A. Importance of U.S. exports
B. Importance of U.S. imports
C. Importance of international investment
D. Relationship between exports, imports, and foreign investment

TOPIC VIII. TRADE BARRIERS AND TRADE POLICIES

A. Types of trade barriers
B. Reasons for trade barriers
C. Ways to promote freer trade

TOPIC IX. INTERNATIONAL MONETARY PROBLEMS

A. Balance of payments problem:
  1. International accounts
  2. Records
  3. Payments and receipts
B. Currency:
  1. Rates of exchange and exchange problems
  2. Common symbols for money values (Spanish, French, and others)
C. Trade in goods and services:
  1. Merchandise transactions
  2. Military expenditure
  3. Other expenditures (travel, transportation, etc.)
D. Private capital investments
E. Problem of balance in trade

TOPIC X. IMPORT-EXPORT PROCEDURES

TOPIC XI. INTERNATIONAL TRAVEL FOR EXECUTIVES

A. Passports and visas
B. Health requirements
C. Customs and clearance procedures
D. Currencies
E. Free ports
F. Communication with executives during travel

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Also suggested for current developments are periodicals such as *Business Week, U. S. and World Trade, Time, Newsweek, Fortune,* and others.

Calderwood, James D. *International Economic Problems, Curriculum Resources Series.* Chicago: Scott, Foresman, 1961.

Calderwood, James D., and Jones, Hazel J. *World Trade, Curriculum Resources Series.* Chicago: Scott, Foresman, 1961.

Crabbe, Ernest H.; DeBrum, S. Joseph; and Haines, Peter G. *General Business, 9th ed.* Cincinnati: South-Western, 1966. Workbooks, Achievement Tests, and Manual.

Dodd, James H.; Kennedy, John W.; and Olsen, Arthur R. *Applied Economics, 6th ed.* Cincinnati: South-Western, 1962. Workbooks, Achievement Tests, and Manual.

Fairchild, Fred R., and Shelly, Thomas J. *Understanding our Free Economy, 3rd ed.* Princeton, N.J.: D. Van Nostrand Co., 1962.

Feier, Richard. *Economics for Modern Living, 2nd ed.* New York: College Entrance Book Co., 1964.

Finney, Paul. *The Businessman's Guide to Europe.* New York: McGraw-Hill, 1965.

Glos, R. E., and Baker, Harold A. *Introduction to Business, 5th ed.* Cincinnati: South-Western, 1963. Workbook, Achievement Tests, and Manual.

Goodman, Kennard E., and Harriss, C. Lowell. *Economics.* Boston: Ginn and Co., 1963.

Gordon, Wendell C. *International Trade: Goods, People, and Ideas.* New York: Alfred A. Knopf, 1958.

Hailstones, Thomas J.; Martin, Bernard L.; and Wing, George A. *Contemporary Economic Problems and Issues.* Cincinnati: South-Western, 1966.

Holt, Sol. *Economics and You, 3rd ed.* Chicago: Follett Publishing Co., 1964.

Hurwitz, Howard L., and Shaw, Frederick. *Economics in a Free Society.* New York: Oxford Book Co., 1964.

Klein, Jacob, and Colvin, Woolf. *Economic Problems of Today.* Chicago: Lyons and Carnahan, 1959.

Kramer, Roland L. *International Marketing, 2nd ed.* Cincinnati: South-Western, 1964. Manual.

Kramer, Roland L.; d'Arlin, Maurice Y.; and Root, Franklin R. *International Trade and Finance, 2nd ed.* Cincinnati: South-Western, 1966. Achievement Tests and Manual.

Lindholm, Richard W., and Driscoll, Paul. *Our American Economy, 2nd ed.* New York: Harcourt, Brace, and World, 1964.

Mortonson, William P.; Krider, Donald T.; and Sampson, Roy J. *Understanding Our Economy.* Boston: Houghton Mifflin, 1964.

Nanassy, Louis C., and Fancher, Charles M. *General Business and Economics Understandings, 3rd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1967.

Pounds, Norman J. G., and Taylor, James W. *World Geography, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

Price, Ray G.; Musselman, Vernon A.; Hall, J. Curtis; and Weeks, Edwin. *General Business for Everyday Living, 3rd ed.* New York: McGraw-Hill, 1966.

Smith, Augustus H. *Economics for Our Times, 3rd ed., rev.* New York: McGraw-Hill, 1963.

Survey of Trade Relations Between the United States and Common Market Nations. Washington: U.S. Government Printing Office, 1962.

U.S. Balance of Payments. Washington: U.S. Government Printing Office, 1964.

White, C. Langdon, and others. *World Economic Geography.* Belmont, Calif.: Wadsworth Publishing Co., 1964.

Wilhelms, Fred T.; Heimerl, Ramon P.; and Jelley, Herbert M. *Consumer Economics, 3rd ed.* New York: McGraw-Hill, 1966.

Wilson, Harmon, and Eyster, Elvin S. *Consumer Economic Problems, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

Wronski, Stanley P.; Doody, Francis S.; and Clemence, Richard V. *Modern Economics.* Boston: Allyn and Bacon, 1964.

MONEY MANAGEMENT

Specialized Requirement for Social Secretaries and Environmental Knowledge for all Secretaries

Hours **Class: 1 hour daily**

Total: 30 hours

Description and Teaching Suggestions

This unit is designed primarily to assist social secretaries in attending to personal financial matters for their employers, and can also be helpful to other secretarial trainees in managing their personal money matters. The unit provides the opportunity to develop the knowledge, understanding, and appreciation needed for careful and intelligent decision-making regarding personal finances. The study areas are arranged to provide progressive and integrated learning. Class hours will concentrate on the application of the study material to actual problems of personal financial management. Problem-solving is stressed throughout the unit. The ultimate goal of the unit is to develop the ability to recognize existing problems, apply pertinent facts, use logical analysis, and select possible alternative solutions. Upon the attainment of this goal, the trainee should be better able to understand the business society and its participants, and to help his employer in personal matters. Short objective quizzes should be given at frequent intervals to check student progress and to indicate topics requiring remedial work. The major tests are case problems that require the trainee to apply the material learned in class to typical personal financial problems. Major tests should be of the take-home variety, allowing a minimum of two days to complete.

Standards of Achievement

1. Know how to establish and operate a budget.
2. Know current credit rates and credit advantages and disadvantages.
3. Know savings, investing, and life insurance benefits.
4. Know several forms of mandatory and voluntary insurance.
5. Know banking and governmental services available to consumers.
6. Know instruments and requirements of home ownership.
7. Know how to buy household and personal commodities using appropriate consumer guidelines.

Prerequisites for Study of Money Management

General Office Education Units as suggested in the Basic Stenographic-Secretarial Program.

Demonstrated proficiencies equivalent to standards of achievement for those units are acceptable.

Topic Outline

I. Budgeting
II. Credit
III. Savings
IV. Investments
V. Life Insurance
VI. Other Insurance
VII. Home Ownership
VIII. Banking Services
IX. Government and the Consumer
X. Buying Guides

TOPIC I. BUDGETING

A. Definition of budgeting
B. Importance of budgeting
C. Principles of budgeting
D. Methods of budgeting
E. Percentage distribution of budget items
F. Record keeping and budgeting
G. Taxes and budgeting

TOPIC II. CREDIT

A. Four C's of credit
B. Bank credit
C. Consumer credit
D. Charge account credit
E. Installment credit
F. Chattel mortgages:
  1. For the seller
  2. For the buyer
G. Benefits of credit:
  1. For the seller
  2. For the buyer
H. Costs of credit

TOPIC III. SAVINGS

A. Principles of saving
B. Goals for saving
C. Income and savings
D. Expenditures and saving
E. Evaluation of savings institutions and plans
F. Retirement and saving

TOPIC IV. INVESTMENTS

A. Investing in the American economy
B. Investing, speculating, and gambling
C. Principles of investment
D. How to obtain investment information
E. Investment opportunities

TOPIC V. LIFE INSURANCE

A. Types and uses of life insurance
B. Costs of life insurance
C. Terms of settlement
D. Annuities

TOPIC VI. OTHER INSURANCE

A. Mandatory:
  1. Workmen's compensation
  2. Disability benefits insurance
  3. Unemployment insurance
  4. Social security
B. Personal liability insurance
C. Health and accident insurance:
  1. Personal
  2. Group
  3. Income protection
D. Property insurance
E. Automobile insurance:
  1. Collision
  2. Liability

TOPIC VII. HOME OWNERSHIP

A. Role of the real estate agent
B. Market for real estate
C. Legal instruments and documents
D. Selling a home
E. Buying a home

TOPIC VIII. BANKING SERVICES

A. Banks and the consumer
B. Checking accounts

C. Loan services
D. Financial advice
E. Credit information
F. Collection agencies
G. Safe-deposit boxes
H. After-hour deposits

TOPIC IX. GOVERNMENT AND THE CONSUMER

A. Government services
B. Government aids
C. Government regulations
D. Government agencies

TOPIC X. BUYING GUIDES

A. Buying foods
B. Buying fabrics, clothing, and shoes
C. Buying home appliances and automobiles
D. Buying furniture and floor coverings
E. Buying drugs and related products
F. How to use consumer guides

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

COHEN, JEROME B., AND HANSON, ARTHUR W. *Personal Finance, 3rd ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1964.

COLE, R. H., AND HANCOCK, R. S. *Consumer and Commercial Credit Management.* Homewood, Ill.: Richard D. Irwin, Inc., 1960.

CRABBE, ERNEST H.; DEBRUM, S. JOSEPH; AND HAINES, PETER G. *General Business, 9th ed.* Cincinnati: South-Western, 1966. Workbooks, Achievement Tests, and Manual.

DAUTEN, CARL A., AND WELSHANS, MERLE. *Principles of Finance, 2nd ed.* Cincinnati: South-Western, 1964.

FITZSIMMONS, CLEO. *Consumer Buying for Better Living.* New York: John Wiley and Sons, 1961.

LASSER, JACOB KAY. *Managing Your Money.* Garden City, New York: Doubleday, 1963.

LENDSAY, ROBERT. *Financial Management: An Analytical Approach.* Homewood, Ill.: Richard D. Irwin, Inc., 1963.

PRICE, RAY G., AND OTHERS. *General Business for Everyday Living, 3rd ed.* New York: McGraw-Hill, 1966.

ROMAN, JOHN C., AND FINCH ROBERT. *Family Financial Management.* Cincinnati: South-Western, 1964. Manual.

SCOTT, W. E., AND OTHERS. *Everyday Consumer Business.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

WILHELMS, FRED T., AND HEIMERL, RAMON P. *Consumer Economics: Principles and Problems, 2nd ed.* New York: McGraw-Hill, 1959.

WILSON, HARMON W., AND EYSTER, ELVIN S. *Consumer Economic Problems, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

SPECIALIZED OFFICE EDUCATION UNITS

Specialized office education units are designed to provide the skills, knowledge, and attitudes needed by trainees who elect specific fields of stenographic or secretarial work. These areas of specialization are the legal, medical, educational, shorthand (court, convention, law) reporting, foreign-language, engineering, scientific, or executive secretarial fields.

The units can be studied according to the suggested training for each position or can be selected for the individual trainee on the basis of need. These units should be especially useful for refresher or upgrading purposes, or for the continuation of specialized education by trainees in the stenographic or secretarial work.

Public stenographers, shorthand reporters, and legal stenographers or secretaries may, in addition to their suggested training, elect unit(s) that have particular significance to their work. For example, shorthand reporter trainees may elect legal, medical, or engineering terminology to extend their vocabulary and shorthand proficiencies.

LEGAL TERMINOLOGY—DICTATION AND TRANSCRIPTION

Basic Job Skill for Legal Stenographers and Secretaries and Court Reporters. Elective for Public Stenographers and Police Department Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory (or study): 1 hour daily Total: 60 hours

Description and Teaching Suggestions

Through concentrated study and practice of carefully selected, high-frequency law terminology, the trainee learns the meanings, usage, spelling, pronunciation, and construction of shorthand outlines for the more common legal terms. Well planned study of foreign-language syllables appearing in law terms is emphasized. Jurisprudence principles, phraseology, and technical vocabulary are provided to establish the environment for the trainee. Attention is given to the continuous effort needed to meet the constant challenge of vocabulary improvement during employment. Although rote learning of legal terminology and shorthand outlines cannot be avoided, it can be reserved for individual study, while the class hours can be occupied with spelling-match techniques, question-answer exchanges among trainees, and group compilation of new vocabulary lists.

In addition, the teacher can use game techniques such as error detection in spelling word lists, competitive activity among trainees to discover the greatest number of misused law terms in a paragraph, or the writing of paragraphs by trainees to determine who can use the most law terms with correct meanings. Teachers can also devise other games to encourage the learning process. Transcription practice from printed shorthand material, correcting errors of spelling and usage of terms and other deviations from standard transcription practice can both help trainees to improve proofreading and to learn new legal terminology. Legal terminology should be associated with law office practice and procedures. It is suggested that a standard law dictionary be consulted before, during, and after study and practice periods. When studied concurrently with this unit, Legal Office Records and Procedures can provide meaningful employment of the legal terms being learned by the trainee. The use of audio equipment and sound tapes or records is suggested to increase dictation speeds.

Standards of Achievement

Standards for this unit are difficult to measure in terms of free-flow transcription speed because typists' references must be consulted for proper spelling and meaning. Improvement in speed from entry levels of transcription is a supplemental benefit. Tangible wpm range for transcription is difficult to establish. Trainee's dictation and transcription speed should be measured and recorded on the Record of Completion. For employability standards, see job descriptions for legal stenographers and secretaries.

Prerequisites for Study of Legal Terminology—Dictation and Transcription

Speed Dictation and Transcription.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Topic Outline

I. Foreign-Language Syllables
II. Foreign-Language Expressions
III. Common Legal Abbreviations
IV. Real Estate and Tax Terms
V. Lay Terms and Legal Equivalents
VI. Law Reviews and Journals—Terminology
VII. Selected Maxims of Jurisprudence
VIII. General Glossaries

NOTE: Each subject topic should start with, or incorporate whenever appropriate, the study of spelling, meaning, usages of shorthand outlines, and practice in writing shorthand outlines, including roots, prefixes, suffixes, and combined forms.

TOPIC I. FOREIGN-LANGUAGE SYLLABLES

A. Latin
B. French
C. Greek
D. Spanish
E. Practice techniques (see Description)

TOPIC II. FOREIGN-LANGUAGE EXPRESSIONS

A. Latin words and phrases
B. French expressions
C. Expressions in other languages
D. Practice techniques (see Description)

TOPIC III. COMMON LEGAL ABBREVIATIONS

A. Latin words and phrases abbreviated
B. Abbreviations of references:
    1. Law journals, codes, and reports
    2. Courts of original jurisdiction and appeals
    3. Citations of cases
    4. Footnote abbreviations
    5. Practice dictation and transcription from drafts (with abbreviations)

TOPIC IV. REAL ESTATE AND TAX TERMS

A. Land and personal property titles and guaranties
B. Encumbrances, liens, and bonds
C. Terms associated with estate handling
D. Tax terminology and records
E. Dictation and transcription practice using above terms (see Description)

TOPIC V. LAY TERMS AND LEGAL EQUIVALENTS

TOPIC VI. LAW REVIEWS AND JOURNALS—TERMINOLOGY

A. Reporters
B. Digests
C. Statutes (session lawbooks)
D. Compiled statutes
E. Codes including Uniform Commercial Code
F. Encyclopedias
G. Practice dictation and exercises using material from reference works above

TOPIC VII. SELECTED MAXIMS OF JURISPRUDENCE

TOPIC VIII. GENERAL GLOSSARIES

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D. It is suggested that several copies of law dictionaries such as *Black's Law Dictionary* be available for class use.

AMERICAN BAR ASSOCIATION. *The Lawyer's Handbook.* St. Paul: West Publishing Co., 1962.

ANDERSON, RONALD A. *Uniform Commercial Code Teaching Guide.* Cincinnati: South-Western, 1964. Teacher's Book.

BLANCHARD, C. I., AND ZOUBEK, CHARLES. *Most-Used Congressional Record Terms, 2nd ed.* New York: McGraw-Hill, 1952.

CALIFORNIA STATE DEPARTMENT OF EDUCATION. *Business Education Series—Legal Secretary.* Sacramento: California State Department of Education, 1963. Teacher's Manual.

FISK, MCKEE, AND SNAPP, JAMES C. *Applied Business Law, 9th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, Examinations, and Manual.

LESLIE, LOUIS A., AND COFFIN, KENNETH B. *Handbook for the Legal Secretary.* New York: McGraw-Hill, 1958.

MILLER, BESSE MAY. *Legal Secretary's Complete Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

NATIONAL ASSOCIATION OF LEGAL SECRETARIES. *Handbook for the Legal Secretary.* Burbank, Calif.: National Association of Legal Secretaries, 1960.

NATIONAL ASSOCIATION OF LEGAL SECRETARIES. *The Legal Secretary's Manual.* St. Paul: West Publishing Co., 1965.

PRENTICE-HALL EDITORIAL STAFF. *Legal Secretary's Encyclopedic Dictionary.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

———. *Complete Guide to a Profitable Law Practice.* Englewood Cliffs, N.J.: Prentice-Hall, 1965. Teacher's Reference.

SILVERTHAM, J. E. *Word Division Manual.* Cincinnati: South-Western, 1958.

ZOUBEK, CHARLES E., AND RIFKIN, MORRIS W. *Gregg Reporting Short Cuts, 2nd ed.* New York: McGraw-Hill, 1959.

LEGAL TYPEWRITING

Specialized Skill for Legal Stenographers and Secretaries

Hours Class: 1 hour daily Total: 60 hours

Description and Teaching Suggestions

This unit is designed to upgrade the typewriting skill of trainees who are preparing for secretarial or stenographic work in legal offices or legal departments of private businesses or government agencies. In addition to speed and accuracy drill and the learning of technical and legal concepts and terminology, emphasis is on typing legal papers to meet the highest legal-office standards of quality and quantity.

Office-caliber preparation of legal papers includes how to handle margins on legal cap, how and when to number pages, how to type the caption box, how to prepare signature lines for makers of legal papers and witnesses, how to draw the 'Z' ruling, how to prepare acknowledgments and affidavits, how to prepare multiple carbons, how to type the endorsement on the legal back, and how to staple the papers into the legal back.

Legal typing includes very careful proofreading so that an uncorrected error is not released. Erasures usually are not permitted on legal typing work, but when they are, they must be expertly done by the legal typist.

The legal typist should turn out perfect transcripts. Drill materials must be flexible enough to meet the specialized needs of the legal typist and fit into the normal class routine. Imaginative skill-building drills should be used by the teacher. Graduated-speed paragraphs can be used to motivate trainees to retype the same paragraph. Trainees should not advance to the next speed until they reach the stated speed objective.

While the legal secretarial trainee is not in training to become a lawyer, technical legal material must be mastered. Two ways to convey this technical legal information are lectures by the teacher and learning guides which permit trainees to develop at their own pace.

On-the-job work requirements should be incorporated in the problem material. Turning out usable and mailable work in acceptable quantities should be emphasized. Work standards rise sharply when the trainee knows that the teacher requires work with a strikeover, unerased error, or poorly executed correction to be redone. Grading must be on a completely objective basis. Work that cannot be used in a legal office should not be rated as acceptable by the teacher.

It is suggested that teachers have printed law blanks available to help trainees apply basic legal rules and concepts to the particular usage of their State and local jurisdictions. Trainees should have used both manual and *electric* typewriters.

Standards of Achievement

1. Type legal copy for 5 minutes, at a rate of 60 to 75 wpm, with 5 errors or less.
2. Correctly type legal forms used in area.
3. Handle erasures so that they cannot be noticed.

Prerequisites for Study of Legal Typewriting

Typewriting: 40 words per minute for 5 minutes with 5 errors or less.

Legal Terminology—Dictation and Transcription, Legal Office Records and Procedures, or Advanced Typing and Production Problems may be studied concurrently.

Topic Outline

I. Introduction
II. Contracts
III. Real Estate
IV. Civil Action
V. Civil Action: Automobile Negligence and Insurance
VI. Business Organizations: Partnerships
VII. Business Organizations: Corporations
VIII. Bankruptcy
IX. Criminal Action
X. Wills and Probate Proceedings

NOTE: In addition to learning concepts and terminology, typing of documents, letters, and briefs should be practiced.

TOPIC I. INTRODUCTION

A. Basic mechanics of typing on legal cap:
    1. Choosing margins
    2. Numbering pages
    3. Typing the caption box
    4. Preparing signature lines
    5. Drawing the 'Z' ruling
    6. Handling multiple carbon copies

  - 7. Typing the endorsement
  - 8. Handling the backing sheet
  - 9. Proofreading and erasing
  - 10. Typing sums of money
- B. Typing 'fill-ins' on legal law blanks:
  - 1. Use of ratchet release
  - 2. Use of variable line spacer

TOPIC II. CONTRACTS

- A. Definitions
- B. Essentials
- C. Breach of contract as the basis of a legal action
- D. Preparation of agreements on legal cap and on printed law blanks

TOPIC III. REAL ESTATE

- A. Definitions:
  - 1. Real property
  - 2. Personal property
- B. Contract of sale
- C. Deed
- D. Bond
- E. Mortgage
- F. Acknowledgment
- G. Affidavit

TOPIC IV. CIVIL ACTION

- A. Kinds of civil actions
- B. Tracing a civil action:
  - 1. Summons and complaint
  - 2. Answer
  - 3. Counterclaim
  - 4. Interrogatories
  - 5. Notice of trial
  - 6. Verdict
  - 7. Judgment
  - 8. Appeal

TOPIC V. CIVIL ACTION: AUTOMOBILE NEGLIGENCE AND INSURANCE

- A. Lawsuits–tort action
- B. Definitions
  - 1. Risks and insurance
  - 2. Contributory negligence
  - 3. Indemnification
  - 4. Insurable interest
  - 5. Bodily injuries
  - 6. Property damage
- C. Financial responsibility laws
- D. Accident statement
- E. Power of attorney
- F. Letter of representation
- G. Writ and summons
- H. Interrogatories
- I. Plaintiff's declaration
- J. Defendant's answer
- K. Settlement outside the courtroom

TOPIC VI. BUSINESS ORGANIZATIONS: PARTNERSHIPS

- A. Definitions–kinds of partnerships
- B. Co-partnership agreement
- C. Business certificate
- D. Agencies
- E. Dissolution of co-partnership

TOPIC VII. BUSINESS ORGANIZATIONS: CORPORATIONS

- A. Definitions
- B. Characteristics
- C. Incorporation–articles of organization
- D. Corporate resolutions
- E. Stock certificates
- F. By-laws
- G. Minutes
- H. Proxy
- I. Dissolution

TOPIC VIII. BANKRUPTCY

- A. History
- B. National Bankruptcy Act
- C. Definitions
  - 1. Bankruptcy
  - 2. Insolvency
  - 3. Voluntary vs. involuntary
- D. Statement of affairs
- E. Petition in bankruptcy
- F. Schedules
- G. Discharge
- H. Notary public

TOPIC IX. CRIMINAL ACTION

- A. Rules of law:
  - 1. Wrongs
  - 2. Adjective and substantive law
  - 3. Torts and civil law
  - 4. Criminal law
- B. District attorney
- C. Principal and accessory
- D. Felony and misdemeanor
- E. Criminal action:
  - 1. Warrant
  - 2. Arraignment
  - 3. Indictment
  - 4. Grand jury
  - 5. Bail proceedings
  - 6. Judgment
  - 7. Appeal
  - 8. Citations

TOPIC X. WILLS AND PROBATE PROCEEDINGS

A. Definitions:
   1. Testator
   2. Executor
   3. Administrator
B. Oral and written wills
C. Testimonium clause
D. Attestation clause
E. Revocation
F. Codicil
G. Probate petition
H. Fiduciary bond

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

FISK, MCKEE, AND SNAPP, JAMES C. *Applied Business Law, 9th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, Examinations, and Manual.

GRAHN, MILTON; CURCHACK, NORMA; AND YENGEL, H. F. *Legal Typewriting.* New York: McGraw-Hill, 1967.

LESLIE, L., AND COFFIN, K. *Handbook for the Legal Secretary.* New York: McGraw-Hill, 1958.

MILLER, BESSE MAY. *Legal Secretary's Complete Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

SLETWOLD, EVANGELINE. *Sletwold's Manual of Documents and Forms for the Legal Secretary.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

Printed law blanks for particular jurisdictions may be purchased from local law stationers.

LEGAL OFFICE RECORDS AND PROCEDURES

Functional Requirement for Legal Stenographers and Secretaries

Hours Class: 2 hours daily

Total: 60 hours

Description and Teaching Suggestions

Since law office work assumes many forms, legal stenographers and secretaries are usually expected to keep records of the firm's business and to prepare legal papers and reports for handling its client's business. This unit reviews certain secretarial and stenographic basic skills and knowledges including legal terminology, business law, the implications of the Uniform Commercial Code, language skills and communications, and accounting practices. The application of these skills to the preparation of legal office records, including legal papers, is stressed through realistic practice exercises. Legal forms and documents, as referenced in the outline, should be available for class exhibit and use. The various types of courts, local, State, and Federal, and their association with the work in a law office, should be explained. A practicing attorney in the community should be asked to talk to the group about law office practices and procedures. If possible, a visit to a busy law office may also be arranged later in the program.

Standards of Achievement

1. Prepare (transcribe and type) legal correspondence.
2. File law office documents accurately.
3. Maintain simple bookkeeping or fiscal records for law office.
4. Prepare legal forms as directed.
5. Demonstrate procedure for making collections.
6. Prepare specialized legal forms for business and real estate transactions.

Prerequisites for Study of Legal Office Records and Procedures

Legal Typewriting or Legal Terminology—Dictation and Transcription may be concurrent studies.

Topic Outline

I. Professional Status of the Legal Secretary
II. Legal Correspondence
III. Law Office Files
IV. Record Keeping in the Law Office
V. Courts, Court Documents, and Legal Papers
VI. Office Procedures Affecting Collections
VII. Office Records in Specialized Practice

TOPIC I. PROFESSIONAL STATUS OF THE LEGAL SECRETARY

A. Ethics and the legal secretary
B. Status as a typist of legal papers:

1. Preparation of transcripts and legal forms including briefs
2. Disposition of legal papers

TOTIC II. LEGAL CORRESPONDENCE

A. Brief review of letter mechanics
B. Miscellany relative to correspondence:
  1. Continuation sheets
  2. Notations and postscripts
  3. Interoffice memoranda
  4. Enclosure marks and enclosures

TOPIC III. LAW OFFICE FILES

A. Classification of files:
  1. Clients' business files—
    a. Card index
    b. Transcript files
    c. Case records file
  2. Personal files
  3. Commercial collection files
  4. General correspondence files
  5. Form files
  6. Information and miscellaneous files
B. Indexing and filing rules and procedures
C. Review methods of filing
  1. Alphabetic
  2. Numeric
  3. Geographic or subject

TOPIC IV. RECORD KEEPING IN THE LAW OFFICE

A. Review of elementary principles of bookkeeping:
  1. Records of income from clients served
  2. Records of expenses incurred in operating office
  3. Records required—
    a. Checkbook (bank reconciliation statement)
    b. Cash journal
    c. General ledger
    d. Subsidiary accounts receivable, or clients, ledger
    e. Records of time and cost of service—
      (1) Daily time sheet
      (2) Clients' ledger
B. Bookkeeping and clerical duties and records
  1. Paying bills and maintaining petty cash records
  2. Writing payroll checks and keeping track of taxes withheld (FICA, State and Federal income tax)
  3. Keeping track of expended monies
  4. Billing the client
C. Systems designed for law-office bookkeeping
  1. Chandler system
  2. Histacount system
  3. Colwell's Daily Log for Lawyers

TOPIC V. COURTS, COURT DOCUMENTS, AND LEGAL PAPERS

A. Courts:
  1. Types
  2. Local structure and personnel involved
  3. State structure and personnel involved
  4. Federal structure and personnel
B. Municipal, State, and Federal prosecuting attorneys
C. Developing a broad law vocabulary:
  1. Use of unabridged dictionary
  2. Use of standard law dictionary
  3. Review of legal terminology studies
D. Forms in the lawyer's manual
E. Form book of patterns for legal papers and court documents:
  1. Hyler's sets and Owen's sets
  2. Twenty most frequently-used forms: affidavit assignment, attachment, bankruptcy forms, bill of sale, bond (collateral and indemnity), chattel mortgage, contract (building, installment, employment), garnishee, general release, habeas corpus, judgment, mechanics lien, partnership, power of attorney, probate records, replevin, release and satisfaction, subpoena, photostat recording forms, wills.

TOPIC VI. OFFICE PROCEDURES AFFECTING COLLECTIONS

A. Bonded commercial law lists
B. Handling commercial collections:
  1. Filing collection items
  2. Follow-up system
  3. Acknowledgment of claims and reports to forwarders
  4. Collection letters
  5. Payments and records
  6. Remittances and fees—American Law League recommendations
C. Uncontested suits—summons, complaints, judgments

TOPIC VII. OFFICE RECORDS IN SPECIALIZED PRACTICE

A. Corporation practice—forms: certificate of incorporation, subscription agreement, proxy, transfer of stock
B. Real estate practice—forms: abstract of title, assignment, option to purchase, application loan, binder, bond and mortgage, real estate contract, deed, mortgage, leases, foreclosure proceedings

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Anderson, Ronald A. *Uniform Commercial Code Teaching Guide*. Cincinnati: South-Western, 1964. Teacher's Book.

Fisk, McKee, and Snapp, James C. *Applied Business Law, 9th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, Examinations, and Manual.

Guthrie, Mearl R. *Alphabetic Indexing, 3rd ed.* Cincinnati: South-Western, 1964. Manual.

Leslie, Louis A., and Coffin, Kenneth B. *Handbook for the Legal Secretary*. New York: McGraw-Hill, 1958.

Miller, Besse May. *The Legal Secretary's Complete Handbook*. Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Prentice-Hall. *Federal Tax Service*. Englewood Cliffs, N.J.: Prentice-Hall.

———. *Encyclopedia of Incorporating Forms*. Englewood Cliffs, N.J.: Prentice-Hall.

Rosenberg, R. Robert, and Ott, William G. *College Business Law, 3rd ed.* New York: McGraw-Hill, 1966. (Special emphasis on Uniform Commercial Code)

Sletwold, Evangeline. *Sletwold's Manual of Documents and Forms for the Legal Secretary*. Englewood Cliffs, N.J.: Prentice-Hall, 1965.

It is suggested that a supply of *Blumberg's Law Blanks* and *Jones Legal Forms (Annotated)* be made available. In addition, copies of a law dictionary such as *Black's Law Dictionary* should be on hand for class use.

STENOGRAPHIC MACHINE OPERATION IV—SHORTHAND REPORTING

Specialized Skill for Court, Conference, and Convention Shorthand Reporters Using Machine Shorthand

Hours Class: 3 hours daily. Practice Time: 4 hour daily Total: 700 hours (variable)

Description and Teaching Suggestions

This is a completely specialized unit. A trainee who aspires to shorthand reporting must be prepared to work more than the hours suggested for this unit. He must be emotionally stable, have excellent hearing and good vision, and have the ability to handle all circumstances with ease. Concentration is paramount; retentive powers are essential.

The trainee is introduced to, and expected to master, all types of terminology, including ungrammatical utterances and gross mispronunciation. Dictation is given at different speed ranges with stress placed on the trainee's immediate response to the spoken word. Developing the ability to take two-, three-, and four-voice testimony is stressed. Endurance ability to take sustained dictation for transcription for 15 to 30 minutes is developed. Trainees may finish study of this unit when they meet employment standards in their areas, usually 175 wpm or better.

Brief forms and rules pertinent to different phases of court and convention reporting are given to the trainee. However, this phase of the study unit is optional, since mastering these new forms is not mandatory for speed purposes.

The facility to transcribe all forms of court or conference reporting, including legal and medical terminology, is imperative. Trainees are exposed to actual reporting conditions as much as possible. Practice "takes" of five minutes should be dictated at timed speeds, and the trainee should read back his notes in full. Accuracy of read-back must be carefully checked. Problems encountered during the "take," including grammar, punctuation, and other English language skills, should be discussed so that maximum value is derived. Trainees should develop the "one-crack only" psychology for verbatim reporting. Trainees can accelerate speed development by using a tape recorder at home for high-speed dictation and read back. All types of material should be given in heavy dictation. Two-, three-, or four-voice dictation, simulating conventions, courtroom, arbitration proceedings, etc., should be acted out or recorded. Other trainees can participate in the simulated multiple voice exercises.

Standards of Achievement

Take and transcribe dictation given at levels of speeds ranging from 160 to 200 wpm. The following are suggested as achievement levels:

1. Three 5-minute takes of each speed level (160, 175, 190, 200 wpm), transcribed with 97 percent accuracy.
2. Four 10-minute takes of straight matter, with

97 percent accuracy, and transcribed at a rate of 50 to 70 wpm.

3. Typewriting speed on straight copy at 70-90 wpm for ten minutes, with five errors or less.

Prerequisites for Study of Stenographic Machine Operation IV

Stenographic Machine Operation III.

Demonstrated proficiencies equivalent to standards of achievement for the above are acceptable.

Specialized Office Education Units in the legal, medical, and engineering fields may be studied concurrently.

Topic Outline

I. Advanced Speed Practice, For Machine Shorthand, Book V
II. Legal, Medical, and Technical Terminology
III. Testimony Dictation
IV. Jury Charge Dictation
V. Legal and Medical Transcription of Reports, Briefs, Arbitration Proceedings, Operations, and Autopsies
VI. Pre-Trial Examination Transcription
VII. Economic, Industrial, and Philosophic Dictation

TOPIC I. ADVANCED SPEED PRACTICE, FOR MACHINE SHORTHAND, BOOK V

TOPIC II. LEGAL, MEDICAL, AND TECHNICAL TERMINOLOGY

NOTE: This topic may be shortened if trainees have elected special terminology units of study in the areas indicated.

TOPIC III. TESTIMONY DICTATION

A. Shorthand mastery of variety of low-syllable dictation material (negligence, criminal, contract, etc.) at timed speeds
B. Practice of high-frequency phrases and abbreviations adaptable to testimony dictation
C. Drill on short-hand-designations for multi-voice dictation

TOPIC IV. JURY CHARGE DICTATION

A. Shorthand mastery of variety of dictation material (negligence, criminal, contract, etc.) at timed speeds
B. Practice of high-frequency phrases and arbitrary abbreviations adaptable to jury charge dictation

TOPIC V. LEGAL AND MEDICAL TRANSCRIPTION OF REPORTS, BRIEFS, ARBITRATION PROCEEDINGS, OPERATIONS, AND AUTOPSIES

NOTE: It is suggested that varying dictation speeds be used since some of the trainees who have elected study of legal and medical terminology may be further advanced than other trainees.

TOPIC VI. PRE-TRIAL EXAMINATION TRANSCRIPTION

TOPIC VII. ECONOMIC, INDUSTRIAL AND PHILOSOPHIC DICTATION

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L., AND ATKINSON, PHILIP. *Medical Office Practice*. Cincinnati: South-Western, 1966.

BALDWIN, W. *Baldwin's Pocket-Law Dictionary*. Cleveland: Banks-Baldwin, 1951.

BARRY COLLEGE. *Medical Terminology for Court Reporters*. Miami, Fla.: Barry College.

Civil Service Tests Book for Court Reporting. New York: Arco Publishing Co.

Congressional Record. Washington: Superintendent of Documents, U.S. Government Printing Office.

LESLIE, LOUIS, AND ZOUBEK, CHARLES. *Dictation for Transcription*. New York: McGraw-Hill, 1963.

MEYER, BERNARD S. *New York Pattern Jury Instructions—Civil*. Mount Kisco, N.Y.: Baker, Voorhis & Co., 1965.

NATIONAL SHORTHAND REPORTERS' ASSOCIATION. *Professional Education Series, Law, English, Medical*. New York: National Shorthand Reporters' Association.

STENOGRAPHIC MACHINES, INC. *Advanced Speed Practice, For Machine Shorthand, Text Series in Touch Shorthand, Book V*. Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Courtroom Testimony*. Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Jury Charge*. Skokie, Ill.: Stenographic Machines, Inc., 1965.

———. *Reporting Abbreviations*. Skokie, Ill.: Stenographic Machines, Inc., 1965.

TULIN, NORMAN. *Medical Machine Shorthand*. Los Angeles: Westland Printing Co., 1962.

SHORTHAND REPORTER'S HIGH SPEED DICTATION AND TRANSCRIPTION

Specialized Skill for Manual Shorthand Reporters

Hours Class: 4 hours daily

Total: 1,000 hours (variable)

Description and Teaching Suggestions

This unit is designed to raise the speed of taking technical language dictation at verbatim speeds to 200 wpm and beyond, and can be of varying lengths of time. The variation will depend on the initial speed and accuracy exhibited by the trainee, the degree of individual hand-eye-ear coordination, home practice time available, previous familiarity with technical terminology, and degree of application. Three of the four suggested daily hours should be spent taking dictation, the last hour for reading back. Trainees may finish study of this unit after attaining requisite speed for employment in their locale. Usual *minimum* dictation taking speed is 175 wpm.

It is suggested that 5-minute practice takes be given in gradually increasing timed speeds that put pressure on the trainee, but still allow for accurate read-back. Since trainees should develop one-time only attitudes toward taking dictation, practice takes should be dictated only once. Trainees should also become accustomed to gross mispronunciation of both ordinary English and technical terminology. A tape recorder at home for practice can shorten study time.

Standards of Achievement

1. Take dictation of new material at 175 wpm or better for 5 minutes and transcribe with less than 3 percent error.
2. Transcribe three dictated takes (technical testimony, legal opinion and high-syllabic literature) of 1000 words each, in 120 minutes.

Prerequisites for Study of Shorthand Reporter's High Speed Dictation and Transcription

Minimum requirements for entry are 160 wpm dictation-taking speed of unfamiliar matter and transcription with 97 percent accuracy.

Minimum typing speed of 60 wpm.

Above average command of English language.

Familiarity with specialized technical terminology studies may be helpful.

Topic Outline

I. Technical Testimony Dictation
II. Legal-Opinion Dictation
III. High-Syllabic Literary Dictation

TOPIC I. TECHNICAL TESTIMONY DICTATION

A. Shorthand mastery of doctor's testimony at timed speeds:
  1. Orthopedics
  2. Surgery
  3. Variety of other medical specialties (psychiatry, anesthesiology, cardiology, autopsy, etc.)

B. Shorthand mastery of expert witnesses' technical testimony at timed speeds:
  1. Engineering
  2. Real estate
  3. Building
  4. Variety of other specialties (ballistics, handwriting, automotive, etc.)

TOPIC II. LEGAL-OPINION DICTATION

A. Shorthand mastery of legal opinions at timed speeds:
  1. Criminal
  2. Civil—
    a. Negligence
    b. Contract
    c. Surrogate
    d. Eminent domain
    e. Constitutional
    f. Admiralty
    g. Patent

B. Citations

TOPIC III. HIGH-SYLLABIC LITERARY DICTATION

NOTE: A variety of high-syllabic dictation at timed speeds should be given in such areas as newspaper editorials, speeches, scientific articles, and book reviews.

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D. The materials listed under Stenographic Machine Operation IV may also be appropriate for this unit.

American Medical Association. *Journal of the American Medical Association*. Chicago, Ill.

Gregg Medical Series Tapes. New York: McGraw-Hill.

Leslie, Louis. *20,000 Words, Spelled, Divided*. New York: McGraw-Hill, 1965.

Medical Trial Technique Quarterly. Mundelein, Ill.: Callaghan and Co.

National Shorthand Reporters' Association. *Practice Dictation Tapes*. Madison, Wis.: National Shorthand Reporters' Association.

West, Leonard. *300 Commas*. New York: McGraw-Hill, 1964.

Transcripts of trials of medical malpractice cases may be obtained from law libraries, lawyers, court reporters, and appellate courts.

Paperback reports of Federal, State, and local court judges' opinions may be obtained from lawyers, law libraries, and courts.

Newspaper editorials, magazine articles, and technical juornals can be used for dictation exercises.

COURT REPORTER TRAINING ASSIGNMENT

Functional Requirement for Court Reporters and Elective for Legal Stenographers or Secretaries

Hours **10 a.m. to 5 p.m. (the working hours of the court)** **Total: 2 weeks**

Description and Teaching Suggestions

This unit is designed to give the trainee an idea of the court reporter's position. Under direct supervision of the official court reporter, he reports the trial (familiarizing himself with its mechanics), absorbs the atmosphere of adversary proceedings, and learns in detail the functions of the court reporter, both in and out of the courtroom.

Prerequisites for Court Reporter Training Assignment

Legal stenographic or secretarial studies as suggested or demonstrated equivalent proficiencies.

Shorthand or court reporters studies as suggested or demonstrated equivalent proficiencies.

Topic Outline

I. The Trial
II. Transcription
III. Office Practices
IV. Calendar Procedures
V. Court Personnel
VI. Law Library

TOPIC I. THE TRIAL

A. Selection of jury
B. Openings
C. Examination of witnesses
D. Documentary evidence
E. Motions
F. Closings
G. Judge's charge
H. Verdict

TOPIC II. TRANSCRIPTION

A. Dictating technique and requirements of transcriber
B. Office equipment

TOPIC III. OFFICE PRACTICES

A. Indexing and filing of notes
B. Billing and bookkeeping

TOPIC IV. CALENDAR PROCEDURES

A. Purpose of calendar
B. Calendar call:
  1. Ready
  2. Actually ready
  3. Ready and passed
  4. Ready subject
  5. Off

TOPIC V. COURT PERSONNEL

A. Judge
B. Counsel
C. Clerk
D. Court officer or bailiff
E. Law librarian
F. Legal assistant
G. Legal secretary

TOPIC VI. LAW LIBRARY

A. Contents and location of "reports":
  1. U. S. Supreme Court
  2. State appellate courts
  3. Courts of original jurisdiction
B. Contents and location of *Law Journal:*
  1. Purpose
  2. Contents

C. Contents and location of reference books:
  1. English, law, and medical dictionaries
  2. Encyclopedias
  3. Atlases
  4. Appellate transcripts
  5. Medical and legal directories
  6. Abbott's New York Digest (plaintiff defendant tables)

MEDICAL TERMINOLOGY—DICTATION AND TRANSCRIPTION

Specialized Job Skill for Medical Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory (or Study): 2 hours daily Total: 210 hours

Description and Teaching Suggestions

This specialized unit is designed to prepare the trainee who has had or is taking advanced shorthand, for medical reporting and transcription in the offices of physicians and in hospitals, or wherever such services may be required. The trainee will acquire familiarity with the terminology necessary for recording and transcribing medical correspondence, case history records, autopsy protocols, examiners' reports, insurance forms, and the like.

Stress is placed on learning terminology by mastering the meanings, spellings, and shorthand forms of the prefixes, suffixes, and stems that make up most medical terms. Practice is provided in taking dictation, transcribing, and straight-copy typing from material related to body systems and the effects of disease, injury, or abnormal functioning of each.

Basic texts (including a medical typing text) used should be correlated for study so that new material may be introduced simultaneously with practice in shorthand vocabulary, dictation, and typing of familiar medical material. Acceptable setups of case summaries and formal case histories such as required by The American College of Physicians and Surgeons should be presented. Dictation and transcription practice can also be supplemented by practice in handling special hospital and insurance forms.

Standards of Achievement

1. Take medical terminology dictation of familiar material given at 90 to 120 wpm for five minutes and transcribe with 97 percent accuracy or better.
2. Transcription–Typing: 25 to 40 wpm, corrected, with one carbon copy.

Prerequisites for Study of Medical Terminology—Dictation and Transcription

Introduction to Transcription.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are acceptable.

Speed Dictation and Transcription should be a concurrent study.

Topic Outline

I. Musculoskeletal System
II. Excretory System
III. Digestive System
IV. Endocrine System
V. Female Reproductive System
VI. Male Reproductive System
VII. Cardiovascular System
VIII. Nervous System
IX. Respiratory System
X. Integumentary System
XI. Special Sense Organs
XII. Case Histories, Summaries, and Operative Reports
XIII. Selected Diseases

NOTES:

1. Each of the following topics, except Topic XII, should start with the study of shorthand outlines, meanings, spellings, and usages of (a) prefixes, suffixes, stems, and combined forms and topic-related words, and (b) related biological, chemical, common drug, and medical abbreviations, before proceeding to the listed sub-topics.

2. Teachers should introduce this course with a discussion of the characteristics and roles of basic organic compounds of living matter such as proteins, carbohydrates, and fats. Processes such as osmosis, diffusion, filtration, etc., should be presented along with the introduction of special terminology. Cell structure, and the roles of various components (chromoplasts, ergoplasts, vacuoles, membranes), processes (mitosis, electro-chemical balance), and chemicals (DNA, chromatin) should

be explained and illustrated with films, filmstrips, and diagrams. The emphasis should be on the necessity of understanding being an adjunct to the development of proficiency in terminology and phonetic sounds.

TOPIC I. MUSCULOSKELETAL SYSTEM

- A. Deformities and chronic diseases:
  - 1. Bones and joints
  - 2. Muscular abnormalities and dysfunction
- B. Dictation and transcription of letters, using topic-related terminology, of:
  - 1. Referred patients
  - 2. X-ray reports
  - 3. Short reports of operative techniques
- C. Medical typing from printed copy of material related to topic

TOPIC II. EXCRETORY SYSTEM

- A. Diseases and abnormalities of the excretory system (kidney-ureter-bladder system)
- B. Dictation and transcription, using topic-related terminology, of:
  - 1. Letters
  - 2. Fluoroscopic reports
  - 3. Operative reports
  - 4. Excerpts from physical examinations and from case histories
- C. Medical typing from printed copy (case summaries, letters, sample reports of hospital admissions) of material related to topic

TOPIC III. DIGESTIVE SYSTEM

- A. Diseases and abnormalities of the digestive system
- B. Dictation and transcription, using topic-related terminology, of:
  - 1. Letters
  - 2. Related excerpts from physical examinations
  - 3. Fluoroscopic reports
  - 4. Case summaries containing reports of common tests such as gastric analysis or liver function

TOPIC IV. ENDOCRINE SYSTEM

- A. Diseases and abnormalities of the endocrine glands
- B. Dictation and transcription, using topic-related terminology, of:
  - 1. Letters
  - 2. Reports of tests
  - 3. Case summaries
  - 4. Sample of hospital discharge reports
- C. Medical typing from printed copy of topic-related material

TOPIC V. FEMALE REPRODUCTIVE SYSTEM

- A. Diseases and abnormalities of female reproductive system
- B. Dictation and transcription of a variety of types of gynecological reports, including obstetrics
- C. Medical typing from printed copy of obstetrical and gynecological reports

TOPIC VI. MALE REPRODUCTIVE SYSTEM

- A. Diseases and abnormalities of the male reproductive system
- B. Dictation and transcription using topic-related terminology of related medical reports
- C. Medical typing from printed copy covering medical reports on the topic

TOPIC VII. CARDIOVASCULAR SYSTEM

- A. Diseases and abnormalities of the cardiovascular system
- B. Dictation and transcription, using topic-related terminology, of related medical reports
- C. Medical typing from printed copy covering cardiovascular system. This will serve to introduce formal case histories and operative reports such as required by the American College of Physicians and Surgeons

TOPIC VIII. NERVOUS SYSTEM

- A. Diseases and abnormalities:
  - 1. Organic (neurology)
  - 2. Functional (psychiatry)
- B. Dictation and transcription of reports in the above areas
- C. Medical typing of related reports from printed copy

TOPIC IX. RESPIRATORY SYSTEM

- A. Diseases and abnormalities of the respiratory system
- B. Dictation and transcription, using topic-related terminology, of related medical reports
- C. Medical typing from printed or duplicated copy of autopsy protocol, using related and previously learned terminology

TOPIC X. INTEGUMENTARY SYSTEM

- A. Diseases and abnormalities of the integumentary system
- B. Dictation and transcription, using topic-related terminology, of related medical reports
- C. Medical typing from printed copy of dermatological reports

TOPIC XI. SPECIAL SENSE ORGANS

A. Diseases and abnormalities of the eyes and ears
B. Dictation and transcription, using topic-related terminology, of related medical reports
C. Medical typing from printed copy of reports on eyes and ears

TOPIC XII. CASE HISTORIES, SUMMARIES, AND OPERATIVE REPORTS

A. Dictation and transcription of complete, formal case history and operative report, such as required by the American College of Physicians and Surgeons, covering one of the major body systems (e.g., the digestive, female reproductive system, etc.)
B. Medical typing from printed copy of case summaries and other records found in the offices of specialists
C. Dictation and transcription of complete, formal case history and operative report (as in A above), covering a second major body system, such as the endocrine or the excretory system

TOPIC XIII. SELECTED DISEASES

A. Childhood diseases (not previously covered)
B. Congenital deformities (not previously covered)
C. Neoplasms
D. Infections and parasitic diseases
E. Diseases of the lymphatics
F. Blood diseases
G. Medical typing of reports of diseases related to the topic

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L., AND ATKINSON, PHILIP. *Medical Office Practice.* Cincinnati: South-Western, 1966.

AMERICAN MEDICAL ASSOCIATION. *Current Medical Terminology.* Chicago: American Medical Association. Published annually.

ANTHONY, C. *Textbook of Anatomy and Physiology, 5th ed.* St. Louis: The C. V. Mosby Co., 1961.

Blakiston, New Gould Medical Dictionary. New York: McGraw-Hill, 1956.

BOLLO, LOUISE E. *Introduction to Medicine and Medical Terminology.* Philadelphia: W. B. Saunders Co., 1961.

BREDOW, MIRIAM. *Medical Secretarial Procedures, 5th ed.* New York: McGraw-Hill, 1966. Workbook.

BYERS, EDWARD. *Medical Shorthand Dictionary.* New York: McGraw-Hill, (in production).

COFFIN, KENNETH B., AND COLWELL, R. F. *The Medical Secretary.* New York: Macmillan, 1959.

Dorland's Illustrated Medical Dictionary, 23rd ed. Philadelphia: W. B. Saunders Co.

FROHSE, FRANZ, AND OTHERS. *Atlas of Human Anatomy.* New York: Barnes and Noble, 1952.

GREGG DIVISION. *Medical Dictation and Transcription Tapes.* New York: McGraw-Hill, 10 Reels. Study Guide.

GREGG, J. R.; LESLIE, L.; AND ZOUBEK, C. *Gregg Shorthand Dictionary, Diamond Jubilee Series.* New York: McGraw-Hill, 1963.

JEJEARNED, J. N. *Medical Terminology Made Easy.* Chicago: Physician's Record Co., 1961.

ROOT, KATHLEEN B., AND BYERS, EDWARD E. *The Medical Secretary, 2nd ed.* New York: McGraw-Hill, 1960.

———. *Medical Typing Practice.* New York: McGraw-Hill, 1962.

———. *Medical Terminology and Transcription: Medical Specialties.* New York: McGraw-Hill, (in production 1967).

SHEPRO, DAVID, AND BYERS, EDWARD E. *Medical Terminology and Transcription: Anatomy and Physiology.* New York: McGraw-Hill, (in production).

SMITHER, EFFIE B. *Medical Shorthand Manual and Dictionary.* New York: McGraw-Hill, 1953.

TABER, CLARENCE WILBUR. *Taber's Cyclopedic Medical Dictionary, 8th ed.* Philadelphia: F. A. Davis Co., 1959.

Pamphlets on medical subjects may be obtained from many drug firms. In addition, pamphlets for non-medical trainees may be obtained on a variety of subjects, usually free of charge, from:

The American Cancer Society, New York.
The American Diabetes Association, New York.
The American Heart Association, New York.
The Metropolitan Life Insurance Co., New York.
National Association for Mental Health, New York.
The American Medical Association, Chicago.

The Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, will supply a free price list of available government publications on Health and Hygiene (PL 51) and on Diseases—Contagious and Infectious Diseases, Sickness, and Vital Statistics (PL 51A). Publications included in these price lists cost on the order of 5 or 10 cents each.

Supplies and Equipment

It is suggested that the following teaching aids be available for groups studying this unit.

Skeleton
Mannequin
Insurance and other medical forms
Sample medical reports
Samples of physician correspondence

MEDICAL OFFICE PRACTICES, PROCEDURES, AND RECORDS

Functional Requirement for Medical Secretaries

Hours Class: 2 hours daily **Total: 140 hours**

Description and Teaching Suggestions

This unit, in contrast to the basic job skill unit, Medical Terminology—Dictation and Transcription which is suggested for concurrent study, centers on the functional and environmental aspects of medical secretarial work in a general practitioner's or specialist's office. It begins by informing the medical secretarial trainee about the character and importance of the work, the medical office working environment as contrasted with normal working conditions, and the emotional maturity required of the secretary. Privileged communication and preserving the patient's privacy are emphasized particularly. This unit can also help medical secretaries assigned to doctors working in health foundations or assoications, medical supply and drug firms, medical insurance companies, and hospitals. The scope of work activity for the trainee can be enhanced by enrollment in the Hospital Practices, Procedures, and Records unit.

A special notation precedes Topic IX. This unit concentrates on the facilitating office services to be rendered rather than involvement in medical procedures. However, two topics are devoted to developing knowledge of some of the more common medical procedures and tests, so that the trainee will be familiar with terms and with the names of equipment used. *These topics in no way prepare the worker to perform any of these procedures or tests.* This point should be emphasized by the instructor. These topics will serve to increase the trainee's understanding of patients' mental and physical conditions and permit the medical secretary to function adequately while learning more about the physician's work. Stress is placed on the secretary's ability to work independently most of the time so that the physician may be free to perform professional duties.

Basic secretarial skills, including simple accounting practice, are tailored for medical office work requirements. The importance of receiving patients and visitors and the supervision and care of children are emphasized. Classroom set-ups should provide for practice in these areas through role playing.

Some of the responsibilities of the physician with respect to his profession, professional associations, and laws governing the practice of medicine are discussed to enable the trainee to develop a fuller appreciation of the profession. Teachers of this unit should make arrangements with a practicing physician to discuss pertinent subject content.

Since medical secretaries are normally expected to handle fees, schedule appointments, insurance coverages and applications, medical histories, reports, and many other records involving the financial and legal transactions of the office, topics relating to these functions should be weighted heavily in study unit time allowances. Each should be given ample practice time to prepare the various relevant documents. General bookkeeping and accounting practices should be reviewed. Complete sets for bookkeeping practice should be assigned. Completion of forms for different types of health insurance, workmen's compensation, and accident reports should be practiced. Various legal obligations of the physician, especially license renewals, and the secretary's duties in this regard should be explained. Particular attention should be given to the secretary learning to recognize, and to act, in emergencies.

Guest lecturers from health insurance and pharmaceutical concerns, the narcotics bureau, and representatives of the American Association of Medical Assistants, should be asked to lecture. Although the unit has been designed for medical secretaries, no restriction should be placed on enrollment of medical stenographers for upgrading or enrichment purposes.

Standards of Achievement

1. Receive patients properly.
2. Know the scope and limitations of medical secretarial practice.
3. Use the telephone adequately and courteously.
4. Know the provisions of the Medical Practice Act.
5. Make, cancel, or reschedule appointments.

6. Apply bookkeeping principles to medical office practice.
7. Prepare medical reports under direction of physician.
8. Complete various types of insurance reports.
9. Apply secretarial practices to physician's correspondence, record keeping, and information retrieval.
10. Maintain physician's library.
11. Recognize emergencies that would require immediate attention of the physician.
12. Maintain office supplies, equipment, and restock the doctor's bag.
13. Know narcotics security practices.
14. Know terms and names of equipment used in basic medical procedures and tests.

Prerequisites for Study of Medical Office Practices, Procedures, and Records

General Office Education Units as suggested in the *Curricula Synopses* section or demonstrated equivalent proficiencies.

Medical Terminology—Dictation and Transcription and Hospital Practices, Procedures, and Records may be studied concurrently.

Topic Outline

I. The Doctor's Office and the Medical Secretary
II. Doctor's Office Receptionist Training
III. The Physician and the Law
IV. Medical Records
V. Financial Matters
VI. Doctor's Office Management
VII. Medical Practice and the Physician's Professional Affiliations
VIII. Other Applied Secretarial Skills in Doctor's Office
IX. Medical Procedures Knowledge for Secretaries
X. Miscellaneous Duties in the Doctor's Office

TOPIC I. THE DOCTOR'S OFFICE AND THE MEDICAL SECRETARY

A. Comparison of activities to other businesses:
  1. General practitioner's office
  2. Specialist's office
  3. Psychiatrist's office
B. Nature of medical secretarial work:
  1. Importance of medical secretary—
   a. To physicians
   b. To patients
   c. To others
  2. Basic skills and principal duties
  3. Nature of work in different sizes and types of medical offices
  4. State laws and professional regulations governing work of medical personnel
C. Patients and the medical secretary:
  1. Patient problems—mental and physical conditions
  2. Patient psychology
  3. Action in emergencies—
   a. Patient physically present
   b. Telephone actions (see Topic II)
D. Physicians and medical secretaries:
  1. The secretary as initial representative of physician
  2. Reliance of physician on secretary—
   a. Freedom to do professional work
   b. Scheduling and appointments
   c. Business control
   d. Correspondence and reports
   e. Ability and authority of secretary to make certain decisions in absence of physician
E. Nurses, medical assistants, and the medical secretary:
  1. Need for understanding
  2. Cooperation of medical office personnel

TOPIC II. DOCTOR'S OFFICE RECEPTIONIST TRAINING

A. Appearance
B. Professional conduct
C. Principles of medical ethics:
  1. Serving the common good
  2. Propriety of conduct
  3. Improving knowledge and skill
  4. Safeguarding the public
  5. Quality care
  6. Professional relations—
   a. Consultations
   b. Advertising
   c. Solicitation of patients
   d. Relationship of physician to public information media
  7. Revealing confidences
  8. Quackery
D. Hippocratic oath
E. Medical assistant's obligation
F. Patient and public relations:
  1. Greeting and patient processing
  2. Care and supervision of children—
   a. As patients
   b. As visitors
  3. Visitors other than patients—

        - a. During office hours
        - b. When physician is absent
- G. Using the telephone:
    - 1. Telephone techniques and etiquette
    - 2. When an emergency exists (also see Topic X) –
        - a. Patient emergencies
        - b. Physician needs
    - 3. Locating physician
    - 4. Following through on telephone
    - 5. Telephone services
- H. Appointments:
    - 1. The appointment calendar
    - 2. Making and cancelling appointments
    - 3. House visits by physician
    - 4. Notification to patients in the event of physician's delay
    - 5. Referral of patients to specialists; making and notifying all parties of appointments
    - 6. Appointment advice–
        - a. To patient
        - b. To and from physician

TOPIC III. THE PHYSICIAN AND THE LAW

- A. Medical practice acts:
    - 1. Licensing–
        - a. By whom
        - b. For what
        - c. When not necessary
    - 2. Grounds for revocation of license
- B. Legal relationship of physician and patient:
    - 1. Creation of a contract–
        - a. Physician's part of agreement
        - b. Patient's part of agreement
        - c. Agents–
            - (1) Medical assistant as agent
            - (2) Others as agents for patient
    - 2. Termination of a contract–
        - a. By the physician
        - b. By the patient
- C. Professional liability:
    - 1. Malpractice (negligence) –
        - a. General definition
        - b. Duty–reasonable care definition
        - c. Breach of duty
        - d. Proof of negligence–
            - (1) Burden of proof
            - (2) Expert testimony
            - (3) Admissions
            - (4) Proof by res ipsa loquitur
        - e. Proximate cause
        - f. Defenses to malpractice actions
        - g. Minimizing the danger of unjustified malpractice claims
    - 2. Additional tort liability–
        - a. Assault, battery, and false imprisonment; personal restraint
        - b. Fraud or deceit
        - c. Defamation
        - d. Invasion of privacy
        - e. Liability of physician for acts of others
    - 3. Breach of contract–
        - a. Promise to cure
        - b. Promise to perform a service
        - c. Promise not to compete in practice of medicine
    - 4. Professional liability insurance (see Topic V (C))
- D. The physician's public duties and liabilities:
    - 1. Reports and services–
        - a. Vital statistics and records
        - b. Communicable diseases
        - c. Venereal diseases
        - d. Commitment of mental patients
        - e. Reports to police
        - f. Narcotic legislation–
            - (1) Federal statutes
            - (2) Obtaining narcotics
            - (3) Registration
            - (4) Inventory
            - (5) Dispensing
            - (6) Administering
            - (7) Addicts
    - 2. Physician as a witness–
        - a. Qualification as expert
        - b. Physician-patient privilege
    - 3. Criminal liabilities

TOPIC IV. MEDICAL RECORDS

- A. Patients' histories:
    - 1. Content
    - 2. Forms
- B. Medical reports:
    - 1. Laboratory reports
    - 2. Reports to other physicians or specialists
    - 3. Vaccination and school reports
    - 4. Autopsy and other hospital reports
    - 5. Insurance reports
- C. Narcotics records
- D. Consent forms

TOPIC V. FINANCIAL MATTERS

- A. The doctor's fees:
    - 1. Discussion of fees with patients and others
    - 2. Credit information

    3. Medical insurance coverage (see C. below)
    4. Billing procedures
    5. Collections by letters, telephone, and agencies

B. Medical office bookkeeping:
    1. General accounting theories review
    2. Special bookkeeping systems for physicians
    3. Receivables and payables
    4. Payroll records
    5. Banking services
    6. Cash receipts and petty cash
    7. Working with the physician's accountant

C. Insurance:
    1. Government sponsored insurance, Medicare
    2. Prepaid health insurance: Blue Cross, Blue Shield, or applicable local plans
    3. Workmen's compensation insurance
    4. Malpractice insurance
    5. Insurance claim forms

TOPIC VI. DOCTOR'S OFFICE MANAGEMENT

A. Maintenance of office:
    1. Care of equipment
    2. Care of plant

B. Safety rules:
    1. Fire Hazards
    2. Accident hazards
    3. Narcotics control

C. Supplies:
    1. Medical supplies
    2. Linens
    3. Sationery supplies
    4. Storing, purchasing, inventory of supplies and equipment

D. Non-medical office records:
    1. Insurance policies
    2. Leases and other contracts
    3. Investments
    4. Licenses—
        a. Expirations
        b. Renewals (especially narcotics license)

TOPIC VII. MEDICAL PRACTICE AND THE PHSYSICIAN'S PROFESSIONAL AFFLIATIONS

A. Types of medical practice

B. Medical specialties, diplomates

C. Medical societies:
    1. Types of societies
    2. Membership, committees, officers
    3. Meeting dates

D. Medical journals:
    1. Subscriptions
    2. Reprints of articles

TOPIC VIII. OTHER APPLIED SECRETARIAL SKILLS IN DOCTOR'S OFFICE

A. Review of business correspondence and reports:
    1. Writing business letters
    2. Preparing reports
    3. Mailing services

B. Review of indexing and filing practice:
    1. Filing systems for doctor's office
    2. Filing equipment
    3. Filing supplies

C. Office machines review:
    1. Transcription machines
    2. Copying machines
    3. Adding machines
    4. Miscellaneous mechanical aids

D. Making travel arrangements for physician:
    1. Reservations (airline, train, hotel, rental car)
    2. Itinerary
    3. Travel funds
    4. Activities during physician's absence from office

E. References, resources, and physician's library:
    1. Dictionaries
    2. Biographical directories
    3. Secretarial handbooks
    4. Index to medical publications
    5. General directories
    6. Maintaining physician's library
    7. Maintaining control of reading materials for patients and visitors

F. Preparation of manuscripts:
    1. Library research
    2. Typing the manuscript in required form for submission to journal or publisher
    3. Proofreading
    4. Preparing an index

TOPIC IX. MEDICAL PROCEDURES KNOWLEDGE FOR SECRETARIES

The following topics should be presented to the trainee to impart knowledge of some common medical procedures and tests. *It is emphasized that the information presented does not qualify the trainee to perform any of these procedures and tests.* The topics are presented only to familiarize the trainee with the related terminology. Actual performance of these duties are the province of the medical assistant. However, knowledge of the topics (in terms of records and clerical tasks involved and patient's experience) is necessary for proper office management and patient relations.

Unless the worker has had specialized training in laboratory procedures, diagnostic tests must never be attempted. *The worker should never administer medication or professional treatment under any circumstances.*

- A. Diagnostic tests:
  - 1. Urinalysis
  - 2. Blood tests
  - 3. Basal metabolism tests
  - 4. Electrocardiogram
  - 5. X-ray procedures
  - 6. Other special types of tests
- B. Instructions to patients for preparing for examinations
- C. Medications:
  - 1. Types
  - 2. Methods of administration
  - 3. Dosage
  - 4. Prescriptions
- D. Treatments:
  - 1. Types
  - 2. Physical therapy apparatus
  - 3. Office surgery
  - 4. Other specialized treatments as performed by general practitioner or specialist

TOPIC X. MISCELLANEOUS DUTIES IN THE DOCTOR'S OFFICE

- A. Care of equipment:
  - 1. Cleanliness
  - 2. Sterilization procedures
- B. The doctor's bag:
  - 1. Inspection
  - 2. Removal of pertinent supplies
  - 3. Restocking
- C. First aid:
  - 1. Emergencies in a doctor's office
  - 2. Calling for help in emergencies
- D. Arranging for repairs and custodial services

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Bredow, Miriam. *Medical Secretarial Procedures, 5th ed.* New York: McGraw-Hill, 1966.

———. *The Medical Assistant, 2nd ed.* New York: McGraw-Hill, 1964.

Ellsworth, J. Phil, and Jackson, Paul R. *Applied Bookkeeping, 4th ed.* New York: McGraw-Hill, 1965.

JeJearned, J. N. *Medical Terminology Made Easy.* Chicago: The Physician's Record Co., 1961.

Roblee, Ernest. *Thompson and Thompson Physician's and Surgeon's Practice Set.* Cincinnati: South-Western, 1964. Key.

———. *Professional Projects.* Cincinnati: South-Western, 1962. Key.

Root, Kathleen B., and Byers, Edward E. *The Medical Secretary—Terminology and Transcription, 2nd ed.* New York: McGraw-Hill, 1960.

Steller, C. J., and Moritz, A. R. *Regan's Doctor and Patient and the Law, 4th ed.* St. Louis: The C. V. Mosby Co., 1962.

Whitcomb, Helen, and Lang, Rosalind. *Charm: The Career Girl's Guide to Personal and Business Success.* New York: McGraw-Hill, 1964.

HOSPITAL PRACTICES, PROCEDURES, AND RECORDS

Functional Requirement for Medical Stenographers and Secretaries

Hours **Class: 2 hours daily** **Total: 135 hours**

Description and Teaching Suggestions

This unit has been designed to meet those requirements that relate to the functional duties expected of medical stenographers and secretaries who enter the hospital field of work. In addition, the unit provides for enlarging the scope of useful knowledge of medical secretaries who work in physicians' offices. The unit includes study of the usual practices found in hospitals, the various records used, and it acquaints the trainee with routine hospital procedures. Field trips should be arranged to local hospitals to supplement classroom studies and homework assignments. These trips should be carefully planned in advance and should be coordinated with other teachers' activities in the Medical Terminology—Dictation and Transcription and Medical Office Practices, Procedures, and Records units of study. At the hospital, department heads, the medical librarian, and hospital secretaries should be asked to participate in the training. Teachers should make every effort to obtain a sufficient quantity of typical hospital forms and records for use by the students. Practice time in filling out these forms should be given using role playing, with one or more trainees taking the roles of patients, relatives, or friends. Evaluation of trainee achievement in this unit can be made by objective tests and teacher observations.

Standards of Achievement

1. Complete typical hospital records and forms.
2. Demonstrate knowledge of hospital procedures and practices on objective tests of topical content by grades of 90 percent or better.

Prerequisites for Study of Hospital Practices, Procedures, and Records

General Office Education Units as suggested.

Demonstrated proficiencies equivalent to standards of achievement for those units are acceptable.

Medical Terminology—Dictation and Transcription and Medical Office Practices, Procedures, and Records may be studied concurrently.

Topic Outline

I. Hospital Organization and Services
II. Admitting Office Routines
III. Patient Records
IV. Special Hospital Departments
V. Working in Clinic
VI. Medical Records Library
VII. Administrative Office of Hospital

TOPIC I. HOSPITAL ORGANIZATION AND SERVICES

A. Organization of typical hospital:
    1. Authorities and responsibilities
    2. Lines of command
    3. Organization chart
B. Services:
    1. Medical
    2. Surgical
    3. Nursing
    4. Ancillary
    5. Administrative
    6. Social
    7. Schools
    8. Hospital libraries (medical records, nurses' and physicians')
    9. Clinics
C. Departmental organizations
D. Interdepartmental cooperation
E. Hospital affiliations

TOPIC II. ADMITTING OFFICE ROUTINES

NOTE: Admitting procedures vary with each hospital. The following sub-topics are general areas of study only and should be supplemented by teacher knowledge of local hospitals. Visits to local hospitals should be planned.

A. Pre-admission reservations
B. Emergency admission routine
C. Forms completed at entry:
    1. Obtaining necessary personal data
    2. Getting insurance or other financial information
    3. Dealing with relatives or friends of patient
D. Checking valuables
E. Handling advance payments
F. Explaining hospital procedures and regulations
G. Obtaining surgical permissions
H. Routing paperwork and notifying departments of patient arrival
I. Checking prior records
J. Practice in completing admitting office forms
K. Directing, escorting, or arranging for patients to proper department
L. Completing discharge requirements
M. Deaths and autopsy records and notifications

TOPIC III. PATIENT RECORDS

A. Importance of accuracy and completeness
B. Indexing, routing, and filing practices
C. Notification of appropriate persons of specific information
D. Confidential nature of patient records

TOPIC IV. SPECIAL HOSPITAL DEPARTMENTS

A. Medicine
B. Surgery
C. Pathology
D. Roentgenology (Radiology)
E. Physical medicine and rehabilitation
F. Anesthesiology
G. Nursing
H. Out-patient
I. Medical records
J. Dietary
K. Dental
L. Others

NOTE: Include general responsibility and interrelationships of above departments. "Others" may include administrative, psychiatric, personnel, maintenance, laundry, etc.

TOPIC V. WORKING IN CLINIC

A. Out-patient clinics:
    1. Procedures and forms for admission

   2. Special instructions for preparation of patient
   3. Scheduling appointments for patient
   4. Arranging for special services and medicines
   5. Handling payments

B. Follow-up clinic:
   1. Setting up and maintaining follow-up files
   2. Notifying patients
   3. Requesting patient histories
   4. Taking and transcribing doctors' dictation
   5. Working with volunteers and other clerical personnel in clinics
   6. Reviewing of missed or changed appointments

NOTE: Local levels may introduce pertinent patient-care topics as indicated for rounding out this unit.

TOPIC VI. MEDICAL RECORDS LIBRARY

A. Importance and function (legal implications)
B. Medical librarian
C. Hospital records and forms
D. Duties of stenographers and secretaries
E. Medical records library filing practices
F. Standard nomenclature of diseases
G. Coding for index of diseases
H. Key-word identification of material
I. Information retrieval by electronic data processing
J. Microfilming
K. Practice taking dictation, preparing reports, and completing medical record library forms

TOPIC VII. ADMINISTRATIVE OFFICE OF HOSPITAL

A. Nature of transactions
B. Secretarial duties:
   1. Attending meetings and taking minutes
   2. Scheduling meetings and appointments
   3. Handling visitors
   4. Maintaining liaison with operating departments
   5. Preparing correspondence and memoranda

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

AGNEW, PETER L., AND ATKINSON, PHILIP. *Medical Office Practice*. Cincinnati: South-Western, 1966.

ROOT, KATHLEEN, AND BYERS, EDWARD E. *The Medical Secretary: Terminology and Transcription, 2nd ed.* New York: McGraw-Hill, 1960.

———. *Medical Typing Practice.* New York: McGraw-Hill, 1962.

SMITHER, EFFIE B. *Medical Shorthand Manual and Dictionary.* New York: McGraw-Hill, 1953.

SCIENCE SURVEY

Environmental Knowledge for Engineering and Scientific Stenographers and Secretaries

Hours **Class: 2 hours daily** **Total: 60 hours**

Description and Teaching Suggestions

This unit will assist the trainee to better understand the work performed by scientists and engineers. In addition, it also serves as an introduction to scientific terminology and to some of the basic concepts used in the various sciences. These frequently referenced concepts will be encountered by trainees entering science and engineering work. In contrast to traditional presentations of chemistry, physics, and life sciences, the study and classroom activities do not demand problem-solving or experimentation by the trainee. The simpler formulae are presented in context with scientific concepts to develop familiarity with expressions that the beginning worker will hear or see in the course of taking dictation, typing, and locating references. Trainees should be encouraged to take shorthand notes of information presented by the teacher. After defining science and engineering, the unit begins with an overview of the work of scientists and engineers. The laws of motion, electricity, heat, light, and sound are presented. Electricity is used as a basis for studies in chemistry and atomic and sub-atomic concepts. Life sciences are linked to chemistry and then explained briefly. Some of the branches of life sciences are presented, for introductory purposes. Engineering is described in its various forms with reference to the major activities in this work area. The unit can be made more meaningful when trainees discuss assigned readings. Teachers should have the trainee read a variety of source literature in science. Selection of reading materials in the science and engineering areas is not indicated in Texts and Other Teaching Materials section of this unit. Teachers should research appropriate materials in the school library for reading assignments. Objective tests can be prepared to evaluate the trainee's knowledge.

Standards of Achievement

1. Be able to differentiate between pure and applied science and between research and engineering.
2. Know simple laws of motion, light, heat, sound, and electricity and their equations.
3. Know the difference between empirical and theoretical approaches in science.

Prerequisites for Study of Science Survey

General Office Education Units as suggested or demonstrated proficiencies equivalent to standards of achievement for these units.

Scientific Typewriting and specialized science and engineering units may be studied concurrently.

Topic Outline

- I. Overview of Scientific Work
- II. Overview of Engineering Work
- III. Science Areas and Basic Concepts
- IV. The Nature of Engineering Work
- V. Laboratories
- VI. Scientific and Engineering Personnel

TOPIC I. OVERVIEW OF SCIENTIFIC WORK

- A. Definition and purpose
- B. Pure science and research
- C. Applied science and research
- D. Where scientists work:
  - 1. Universities (as teachers and researchers)
  - 2. Corporations—
    - a. General industry
    - b. Specific scientific and engineering companies
  - 3. Government
  - 4. Private and consulting work
- E. The major tools of science:
  - 1. Method
  - 2. Experimentation
  - 3. Hypotheses and theories
  - 4. Mathematics

TOPIC II. OVERVIEW OF ENGINEERING WORK

- A. Definition and purpose
- B. Major types of engineering:
  - 1. Design
  - 2. Construction and fabrication
  - 3. Maintenance and field
- C. Relationship of scientists and engineers
- D. Where engineers work:
  - 1. Companies—
    - a. General industry
    - b. Specific engineering companies
  - 2. Universities (as teachers)
  - 3. Government
  - 4. Private and consulting work

TOPIC III. SCIENCE AREAS AND BASIC CONCEPTS

- A. Physics (macroscopic approach)—
  - 1. Laws of motion and gravity
  - 2. Application of force and simple machines—
    - a. Lever
    - b. Inclined plane
    - c. Screw
    - d. Pulley
  - 3. Light—
    - a. Propagation and theory
    - b. Reflection and refraction principles
    - c. Special light (monochromatic, laser, etc.)
  - 4. Heat—
    - a. Nature of energy
    - b. Simple laws and definitions (calorie, B.t.u., etc.)
    - c. Reaction on physical states
  - 5. Sound—
    - a. Nature and propagation
    - b. Effects, medium, speed
    - c. Simple measurements (decibel, frequency, etc.)
  - 6. Electricity—
    - a. Nature and theory
    - b. Definitions (conductance, capacitance, resistance, current, voltage)
    - c. Generation and distribution (physical)
    - d. Simple laws (Ohm's, Kirchoff's, etc.)
    - e. Apparatus for measurement
    - f. Chemical generation of electricity
  - 7. Atomic and sub-atomic physics—
    - a. Theoretical structure
    - b. Forces and energy
    - c. Fission and fusion
    - d. Sub-atomic particles

- B. Chemistry:
  - 1. Definition of the science
  - 2. Branches (organic, inorganic, bio-chemistry)
  - 3. Elements and the periodic table
  - 4. Simple chemical processes and equations
  - 5. Chemical apparatus
  - 6. Molecular chemistry
- C. Life sciences:
  - 1. Branches and areas of study (zoology, botany, physiology, anthropology, psychology, sociology)
  - 2. Nature of work in various fields
  - 3. Gathering data in the life sciences

PIC IV. THE NATURE OF ENGINEERING WORK

- A. Application of science and mathematics
- B. Objective and purpose
- C. Creative engineering and design
- D. Execution of planning
- E. Estimating materials and costs
- F. Maintenance engineering

TOPIC V. LABORATORIES

- A. Physics (size, equipment, work, and security)
- B. Chemical
- C. Life sciences

TOPIC VI. SCIENTIFIC AND ENGINEERING PERSONNEL

- A. Scientists (education, responsibility, work)
- B. Engineers
- C. Mathematicians
- D. Technicians (laboratory, computer, installation, etc.)
- E. Architects
- F. Draftsmen
- G. Clerical support personnel

Texts and Other Teaching Materials

The choice of assigned readings for this unit is left to the discretion of the teacher.

SCIENTIFIC TYPEWRITING

Specialized Job Skill for Scientific Stenographers and Secretaries. This Unit Is Also Suggested for Engineering Stenographers and Secretaries

Hours Class: 2 hours daily

Total: 60 hours

Description and Teaching Suggestions

Designed as an adjunctive unit for those trainees studying shorthand in the life and physical sciences, engineering terminology, or advanced machine shorthand, this unit stresses improving speed in the use of special keyboard typewriters and the preparation of manuscripts for scientific publications. In addition, trainees are given practice in transcribing from dictating equipment. Emphasis is on correct typing of special symbols, spacing manuscripts for insertion of handwritten equations or diagrams, typing formulae, equations, statistical tables, and using prescribed forms for scientific reports. Practice is included in compiling scientific reports from rough drafts, preparing manuscripts for publication, typing minutes of meetings, and typing special correspondence. Special vocabulary instructions are given as appropriate to the practice material. It is suggested that teachers of this unit have pre-recordings made for voice-writing machine transcription practice. Special instruction booklets available from editors of professional journals or from professional societies, such as the American Psychological Association's Publication Manual, should be made available to the trainees. Engineering stenographers and secretaries should profit from this course. Special typing for this group is included in Engineering Terminology—Dictation and Transcription.

Standards of Achievement

1. Type scientific copy at a rate of 50–70 wpm for five minutes, with all errors corrected.
2. Type and prepare scientific manuscripts, documents, graphic presentations, and reports, according to prescribed formats, from handwritten drafts and notes.
3. Transcribe scientific dictation from voicewriting machines.

Prerequisites for Study of Scientific Typewriting

Typing speed of 50–70 wpm with general business terminology.

General Office Education Units as suggested or demonstrated proficiencies equivalent to standards of achievement for suggested units.

Science Survey.

This unit may be studied concurrently with any of the following:

1. Organic Chemistry Terminology—Dictation and Transcription
2. Physical Sciences Terminology—Dictation and Transcription
3. Engineering Terminology—Dictation and Transcription

Topic Outline

- I. Typewriters, Keyboards, and Techniques
- II. The Greek Alphabet
- III. Commonly Used Mathematical Symbols and Notations
- IV. Commonly Used Chemical Symbols
- V. Typing Equations and Formulas
- VI. Special Formats for Publications
- VII. Mechanics of English for Scientific Typewriting
- VIII. Typing from Drafts and Handwritten Copy
- IX. Preparing Special Documents
- X. Voice-writing Machine Transcription Typing

TOPIC I. TYPEWRITERS, KEYBOARDS, AND TECHNIQUES

- A. Manual, electric, and special typewriters:
  - 1. Variable spacers—
    - a. Vertical line
    - b. Horizontal line
    - c. Proportional spacing
  - 2. Ratchets
  - 3. Templates
  - 4. Justifying typewriters
  - 5. Carriage sizes
- B. Keyboards:
  - 1. Special typewriters used in scientific work
  - 2. Limitations of keyboards
  - 3. Special keyboards—
    - a. Extent of specialization of symbols and letters
    - b. Limitations and problems
  - 4. Practice in using scientific typewriter keyboard
- C. Switching typewriters for special work:
  - 1. Alignment problems
  - 2. Spacing problems
- D. Practice in typing from printed and handwritten materials

TOPIC II. THE GREEK ALPHABET

- A. Lower-case alphabet identification and sounds
- B. Upper-case alphabet identification
- C. Similarities to and differences from English

TOPIC III. COMMONLY USED MATHEMATICAL SYMBOLS AND NOTATIONS

- A. Algebraic symbols:
  - 1. Confusions resulting from signs and letters
  - 2. Parentheses and brackets
  - 3. Superscripts (number and letter), subscripts (number and letter), degrees, minutes, and seconds
  - 4. "Greater than" and "less than" signs
  - 5. Plus, minus, multiplication, division, roots (implied, lettered, numbered), and combinations of signs
  - 6. "Function," "deduction," and "therefore" signs
  - 7. Use of italics and underscores
  - 8. Practice exercises using algebraic notations
- B. Geometric symbols:
  - 1. Nature of abbreviations for functions of angles
  - 2. Placement of typed symbols on diagrams and on coordinate graphs
  - 3. Perpendicularity, non-equality, similarity, and identity signs
  - 4. Practice exercises in using geometric symbols
- C. Combined algebraic and geometric notation and symbols
- D. Signs and notations from calculus:
  - 1. Differential notation (plain and partial) including increment sign
  - 2. Integral signs (single and multiple) including summation sign
  - 3. "Goes from" and "goes to" signs
  - 4. Limits, expressions, and symbols
  - 5. Infinity symbol
  - 6. Combination notation of algebraic, geometric, and calculus signs
  - 7. Practice exercises in using calculus signs and symbols

TOPIC IV. COMMONLY USED CHEMICAL SYMBOLS

- A. Introduction to periodic table and element abbreviations
- B. Chemical compounds notation
- C. Formulae, strike-outs, indicating balances
- D. Temperature scale notation:
  - 1. Centigrade
  - 2. Fahrenheit
  - 3. Absolute
  - 4. Other

E. Signs for addition and subtraction of heat
F. Pressure measurements and abbreviations
G. Practice exercises using chemical notation

TOPIC V. TYPING EQUATIONS AND FORMULAS

A. Using algebraic, geometric, calculus, and chemical notation, symbols—Greek letters
B. Typing of equations in display form
C. Typing of equations in text line form

TOPIC VI. SPECIAL FORMATS FOR PUBLICATIONS

NOTE: Using the manuscript preparation formats required by various professional journals, trainees should type to several different formats, working from printed material, corrected drafts, and handwritten notes.

TOPIC VII. MECHANICS OF ENGLISH FOR SCIENTIFIC TYPEWRITNG

A. Special terminology
B. Special spellings
C. Use of glossaries and special dictionaries
D. Abbreviations—with and without periods
E. Syllabication practice

TOPIC VIII. TYPING FROM DRAFTS AND HANDWRITTEN COPY

NOTE: Photostats, photographic copies of drafts, and handwritten copy of unclassified material should be given to trainees for practice. Typing work should include drafts, camera-ready copy, and publication-ready manuscripts.

TOPIC IX. PREPARING SPECIAL DOCUMENTS

A. Interoffice memoranda
B. Minutes of meetings
C. Tables and statistical reports
D. Confidential documents:
  1. Number of copies
  2. Security to be maintained
  3. Disposal of manuscripts on which errors exist

TOPIC X. VOICE-WRITING MACHINE TRANSCRIPTION TYPING

NOTE: Several prerecorded tapes of unclassified reports, dictated by a scientist, should be available for trainees using single or multi-channel audio equipment.

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. The teacher should consider the use of specialized encyclopedias, dictionaries, texts, and handbooks in the science and engineering fields. Some of these are listed under Engineering Terminology—Dictation and Transcription, Organic Chemistry Terminology—Dictation and Transcription, and Physical Sciences Terminology—Dictation and Transcription.

KEITHLEY, ERWIN M. *A Manual of Style for the Preparation of Papers and Reports.* Cincinnati: South-Western, 1959.

LLOYD, ALAN; ROWE, JOHN; AND WINGER, FRED. *Gregg Typewriting for Colleges. 2nd ed. Complete.* New York: McGraw-Hill, 1964.

MCGRAW-HILL. *Encyclopedia of Science and Technology.* New York: McGraw-Hill, 1962. Reference use only.

REIGEL, CHARLES, AND PERKINS, EDWARD. *Executive Typewriting.* New York: McGraw-Hill, 1966.

STAFFORD, ALLISON R., AND CULPEPPER, BILLIE J. *The Science-Engineering Secretary,* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

ENGINEERING TERMINOLOGY—DICTATION AND TRANSCRIPTION

Specialized Skill for Engineering Stenographers and Secretaries

Hours Class: 1 hour daily; Study: 1 hour daily Total: 90 hours

Description and Teaching Suggestions

This intensive unit is designed to improve shorthand transcription and typing skills of engineering secretaries and stenographers. Studied in conjunction with Scientific Typewriting, this unit concentrates on dictation and transcription of special engineering terminology and abbreviations. The trainee transcribes from voice-writing machines, rough notes, drafts, and shorthand notes to produce finished proposals, bids, specifications, contracts, reports, and correspondence. This unit provides additional practice in proofreading and in the preparation of single copy, camera-ready materials, direct-image masters, and stencils. Studied in conjunction with Engineering Office Practices, Procedures, and Records, the unit can provide a realistic approach to the work to be done by stenographers and secretaries in engineering offices.

Teachers of the previously mentioned units and the teachers of this unit should cooperate in planning learning sequences.

As in other dictation units, audio devices are suggested to control the speed of dictation of selected material. Terminology should be given in context as much as possible, and not be restricted to rote learning. Not all engineering vocabularies can be covered in the period of time allotted, nor can all the terminology used in any one engineering field be covered completely. Some terminology will have to be learned in the engineering office in which the trainee will be employed. Terminology and abbreviations should *represent* vocabulary used in the mechanical, chemical, electronic, nucleonic, aero-space, electrical, marine, and civil engineering fields. Samples of typical proposals, reports, contracts, specifications, bills of material, and other documents should be available for exhibit and practice typing. Engineering work practices will vary. Therefore, a variety of engineering documents should be offered to prepare trainees for many different work activities. Various engineering handbooks such as *The A.S.M.E. Handbook* should be on hand for reference.

Standards of Achievement

1. Take dictation at a rate of 100–120 wpm for five minutes with a transcription accuracy of 95 percent.
2. Transcribe at a rate of 25–35 wpm or better to produce mailable transcripts.

Prerequisites for Study of Engineering Terminology—Dictation and Transcription

General Office Education Units as suggested in the *Curricula Synopses* section of this guide or demonstrated proficiencies equivalent to standards of achievement for those units. This unit may be studied concurrently with any of the following units:

1. Science Survey
2. Scientific Typewriting
3. Engineering Office Practices, Procedures, and Records

Topic Outline

I. Use of Engineering Handbooks and Manuals
II. Mechanical Engineering Terms and Abbreviations
III. Electrical and Electronic Engineering Terms and Abbreviations
IV. Chemical Engineering Terms and Abbreviations
V. Nucleonics and Aero-space Engineering Terms and Abbreviations
VI. Civil and Marine Engineering Terms and Abbreviations
VII. Technical Reports
VIII. Bids, Proposals, Contracts, and Specifications
IX. Document Production

NOTES:

1. Each of the subject topics below, except Topics I, VII, VIII, and IX, should start with the study of meanings, usage, and spellings of the particular terms and abbreviations before proceeding to the shorthand outlines or machine notes.
2. The areas of engineering classified under each of the topics dealing with a particular branch of engineering do not encompass all the areas of that branch. Time should be allotted carefully to each of the terminology sections. Terminology should be selected carefully, and lists made in advance of subject unit presentation should be checked by an engineer, if possible, for inclusiveness.

TOPIC I. USE OF ENGINEERING HANDBOOKS AND MANUALS

A. Identification of handbooks:
   1. *Civil Engineering Handbook*
   2. *Mechanical Engineers' Handbook*
   3. *Engineering Manual*
   4. *Nuclear Engineering Handbook*
   5. *General Engineering Handbook*
   6. *Electronics and Nucleonics Dictionary*
   7. Other handbooks

B. Using handbooks for reference during transcription:
   1. Spelling
   2. Meaning
   3. Abbreviations
   4. Special information

TOPIC II. MECHANICAL ENGINEERING TERMS AND ABBREVIATIONS

A. Machine—examples: torque, pound-inch, chamfer, outside diameter, shaft horsepower

B. Heat—examples: kilocalorie, Baume, British thermal unit, Reaumur, Stefan-Bortzmann, enthalpy, entropy, adiabatic

C. Hydraulics—examples: weir, rotameter, vena contracta tap, viscosity

D. Practice dictation and transcription of further terminology, in context, for A, B, and C above

TOPIC III. ELECTRICAL AND ELECTRONIC ENGINEERING TERMS AND ABBREVIATIONS

A. Electrical—examples: a.c., d.c., conductivity,

joule, kilovolt ampere, ohm, Wheatstone bridge
B. Electronic—examples: emf, micro-ampere, reactive volt ampere, coulomb, oscilloscope, diodes, transistors
C. Lighting—examples: foot-candle, Lambert, spherical candle power, Angstrom
D. Practice dictation and transcription of further terminology, in context, for A, B, and C above

TOPIC IV. CHEMICAL ENGINEERING TERMS AND ABBREVIATIONS

A. Plastics and synthetics—examples: polyurethane, fractionation, esters
B. Organics and hydrocarbons—examples: cellulose, disaccharide, polymerization
C. Inorganics—examples: catalytic reaction, sublimation, potassium permanganate
D. Practice dictation and transcription of further chemical terminology, in context, for A, B, and C above

TOPIC V. NUCLEONICS AND AERO-SPACE ENGINEERING TERMS AND ABBREVIATIONS

A. Nucleonics—examples: meson, reactor, megaton
B. Aero-space—examples: 10g, inertial guidance, hermetic seal
C. Aeronautical—examples: fuselage, aileron, hydrodynamic
D. Practice dictation and transcription of further terminology, in context, for A, B, and C above

TOPIC VI. CIVIL AND MARINE ENGINEERING TERMS AND ABBREVIATIONS

A. Civil—examples: Brinell hardness number, catenary, tensile strength
B. Marine—examples: magnetic meridian, gyroscope, twin-screw
C. Practice dictation and transcription of further terminology, in context, for A and B above

TOPIC VII. TECHNICAL REPORTS

A. Format references for publications in journals
B. Report techniques:
  1. Spacing and punctuation of terminology
  2. Margins and paragraphs
  3. Footnotes, tabulations, and long quotations
  4. Headings and subheadings
  5. Tables and figures
  6. Pagination
C. Typewritten format:
  1. Introductions
  2. Synopses
  3. Recommendations
  4. The body of the report, complete with major headings, major and minor subheadings, statistical tables, figures, and illustrations
  5. Conclusions
  6. Letters of transmittal
  7. Title pages

TOPIC VIII. BIDS, PROPOSALS, CONTRACTS, AND SPECIFICATIONS

A. Bids in response to R.F.Q.:
  1. Letter form
  2. Proposal form and transmittal letter
B. Proposals:
  1. Importance of proposals
  2. Formal type, printed or duplicated and bound—
    a. Format
    b. Number of copies to be produced
    c. Nature of material—security classification
  3. Proposals in letter form
  4. Enclosures, attachments
C. Contracts:
  1. Formal types
  2. Letter contracts
D. Specifications for civil and military proposals
E. Practice preparation of simple documents related to topic headings

TOPIC IX. DOCUMENT PRODUCTION

A. Determination of appearance, size, and number of copies required
B. Selection of method of reproduction:
  1. Stencil, spirit masters
  2. Camera-ready reproducible copy
  3. Photographic or direct image processes
  4. Carbon copies
C. Collating and binding:
  1. Selecting collating method—
    a. Consider labor cost, time
    b. Use of collating devices (availability)
    c. Outside services
  2. Selecting appropriate binders—
    a. Preference of firm
    b. Recipient specifications

    c. Dollar value of proposal or contract
    d. Cost of binding

D. Routing finished documents

E. Practice document production including typing, figures, illustrations, tables, and cost summary

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D. In addition to typing texts and materials previously listed, the following are suggested:

Adams, Dorothy, and Kurtz, Margaret. *The Technical Secretary*. New York: McGraw-Hill, 1967.

American Standards Association. *American Standard Abbreviations for Scientific and Engineering Terms*. New York: The American Standards Association, 1961.

Baumeister, Theodore. *Mark's Mechanical Engineers' Handbook, 6th ed*. New York: McGraw-Hill, 1958. Reference.

Considine, Douglas M. *Process Instruments and Controls Handbook*. New York: McGraw-Hill, 1957. Reference.

Cooke, Nelson M., and Marcus, John. *Electronics and Nucleonics Dictionary*. New York: McGraw-Hill, 1960. Reference.

Etherington, Harold. *Nuclear Engineering Handbook, 1st ed*. New York: McGraw-Hill, 1958. Reference.

Grouch, W. George, and Zetler, Robert L. *A Guide to Technical Writing*. New York: Ronald Press Co., 1948.

Keithley, Erwin M. *A Manual of Style for the Preparation of Papers and Reports*. Cincinnati: South-Western, 1959.

Laird, Eleanor S. *Engineering Secretary's Complete Handbook*. Englewood Cliffs, N.J.: Prentice-Hall, 1962.

O'Rourke, Charles E. *General Engineering Handbook, 2nd ed*. New York: McGraw-Hill, 1940.

Perry, John H., and Perry, Robert H. *Engineering Manual*. New York: McGraw-Hill, 1959. Reference.

Perry, Robert H.; Chilton, Cecil H.; and Kirkpatrick, Sidney D. eds. *Chemical Engineer's Handbook*. New York: McGraw-Hill, 1963. Reference.

Salisbury, J. Kenneth. *Kent's Mechanical Engineers' Handbook, 12 ed*. New York: John Wiley and Sons, 1950. Reference.

Stafford, Ailson R., and Culpepper, Billie Jean. *The Science-Engineering Secretary*. Englewood Cliffs, N.J.: Prentice-Hall, 1963.

U.S. Government Printing Office. *Style Manual, rev. ed*. Washington: Superintendent of Documents, U.S. Government Printing Office, 1959.

Urquhart, Leonard Church. *Civil Engineering Handbook, 4th ed*. New York: McGraw-Hill, 1959. Reference.

ENGINEERING OFFICE PRACTICES, PROCEDURES, AND RECORDS

Functional Requirements for Engineering Stenographers and Secretaries

Hours **Class: 2 hours daily** **Total: 80 hours**

Description and Teaching Suggestions

Designed for technical secretaries and stenographers, this unit will provide trainees with both environmental knowledge and training in the functional duties required in engineering offices. The trainee should anticipate that actual engineering office practices, procedures, and records may differ from those presented in this unit. These variations will be caused by the nature of the work of the engineering office, the type of clients served, company policies (if the engineering group is a department of a firm), the size of the engineering office force, and the available facilities. The content is comprehensive in nature due to the use of an engineering office model rather than any one specific type. Emphasis in training is on the preparation, handling, routing, storage, and security of a wide variety of engineering office documents. The unit provides a review of basic secretarial practices and relates them to engineering office practices. Trainees should practice preparing requisitions, bills of material, and records of tests, data, and proposals. Correspondence with clients and government bureaus (with proper reference to contracts), accuracy of technical information, and record control of documents is reviewed and practiced. Stress is placed on learning various reproduction processes in terms of their applicability to internal documents and to external publications such as contracts, sub-contracts, and proposals. Practice is given in use of engineering terminology. Teachers should have several engineering handbooks, in addition to copies of samples of documents used in an engineering office, available for trainee study and use. It is suggested that an engineer or consulting engineer be engaged to discuss actual practices in local firms. This unit and the Engineering Terminology—Dictation and Transcription unit should be supplemented with work-experience projects.

Standards of Achievement

1. Prepare, route, control, and store unclassified and confidential documents, graphic presentations, manuscripts, and records for government and industrial clients and for internal use.
2. Use various reproduction processes such as dry and wet process photocopiers, and thermal and chemical reproducers.
3. File, index, and retrieve information, including the use of microfilm reader.
4. Code materials for retrieval.
5. Apply general secetarial practices to engineering office operation.

Prerequisites for Study of Engineering Office Practices, Procedures, and Records

General Office Education Units as suggested for engineering stenographer or secretary, or demonstrated proficiencies equivalent to standards of achievement for suggested units. Engineering Terminology—Dictation and Transcription and Science Survey units may be taken concurrently.

Topic Outline

I. The Engineering Office
II. Reference Materials
III. Information Control Practices and Equipment
IV. Graphic Presentations
V. Reproduction Processes
VI. Review of Office Calculators
VII. Practices Used in Ordering and Receiving
VIII. Applied Secretarial Practices

NOTE: During Topic I, the various fields of enginering—electrical, chemical, mechanical, nucleonic, civil, electronic, etc.—should be explained. The types of work are applicable to all fields.

TOPIC I. THE ENGINEERING OFFICE

A. The nature of the engineering office:
    1. Types of engineering work—
        a. Professional consultant engineering
        b. Design engineering
        c. Construction engineering
        d. Maintenance engineering
        e. Operating and field engineering
    2. Creative and applied work
B. Organization of the engineering office:
    1. Personnel complement—
        a. Administrative engineers
        b. Practicing engineers
        c. Designers
        d. Draftsmen
        e. Technicians
        f. Clerks
    2. Private practice
    3. The engineering office as a department of a company
    4. Policies and procedures
C. Engineering office clients:
    1. Industrial
    2. Government—
        a. Security clearances required
        b. Non-classified work
        c. Confidential work
        d. Secret work
    3. The company (when engineering office is part of a firm)
D. Secretarial functions in the engineering office:
    1. Brief review of general secretarial practices and conduct
    2. Variations in secretarial requirements—
        a. Size of staff
        b. Scope of activity in office
        c. Work for one, two, or more engineers
        d. As secretary to supervisors, managers, and administrator
    3. Assistance with clerical and presentation work
E. Types of documents in engineering office:
    1. Contracts, sub-contracts, proposals, R.F.P.'s, and R.F.Q.'s
    2. Drawings, blueprints, and tracings
    3. Orders, requisitions, bills, and receipts
    4. Engineering reports and manuscripts for publication
    5. Bills of materials and specifications
    6. Personnel records, internal correspondence and letters, and miscellaneous records

TOPIC II. REFERENCE MATERIALS

A. Engineer's library:
    1. Handbooks
    2. Texts
    3. Reports and government documents
    4. Catalogs
    5. Specifications
    6. Blueprint file
B. Secretarial texts and handbooks

TOPIC III. INFORMATION CONTROL PRACTICES AND EQUIPMENT

A. Review of basic filing methods:
    1. Alphabetic

  - 2. Subject
  - 3. Numeric
  - 4. Combination
- B. File material:
  - 1. Correspondence
  - 2. Reports
  - 3. Blueprints, drawings, and tracings
  - 4. Catalogs
- C. Equipment for filing:
  - 1. Drawers
  - 2. Shelf files
  - 3. Rotary files
  - 4. Visible tray files
  - 5. Vertical visible files
  - 6. Filing cabinets—flat drawers for prints
  - 7. Hanging files
  - 8. Notebooks
  - 9. Tube racks
- D. Supplies:
  - 1. Manila folders
  - 2. Suspension folders
  - 3. Expansion folders
  - 4. Pockets, envelopes, tubes, and transparent covers
  - 5. Color codes
  - 6. Plastic tabs
  - 7. Metal tabs
  - 8. Slide on, pasted, and pinned signals
- E. Follow-up files for projects:
  - 1. Tickler
  - 2. Extra (colored) carbon copies
- F. Coding transfer of information to:
  - 1. Punched cards
  - 2. Punched tape
  - 3. Magnetic tape
  - 4. Magnetic discs
  - 5. Microfilm on reels
  - 6. Microfilm in unitized form
- G. Information retrieval:
  - 1. From files, library, and catalogs
  - 2. From sources indicated in F above
- H. Information retention schedules:
  - 1. Legal requirements
  - 2. The high cost of maintenance and storage
  - 3. Authorization for destruction of records
  - 4. Standards for developing retention schedules
- I. Methods of searching for "lost" items
- J. Transfer methods:
  - 1. Periodic
  - 2. Perpetual
- K. Routing information:
  - 1. By procedure
  - 2. By list
  - 3. Using judgment
- L. Government correspondence and documents:
  - 1. Classifications—
    - a. Secret
    - b. Confidential
    - c. Unclassified
  - 2. Security procedures—
    - a. Separate files and/or drawers
    - b. Locks and locking procedures during and at end of work day
    - c. Registry of documents
  - 3. Filing procedures—
    - a. File size
    - b. Identification and indexing by department, branch, branch location, and subject
    - c. Policy on access to secured files
- M. Ordering out and checking in documents, books, prints, and drawings

TOPIC IV. GRAPHIC PRESENTATIONS

- A. Kinds of illustrations:
  - 1. Graphs and charts—
    - a. Line, bar, pie, and pictorial
    - b. Organization charts
    - c. Flow and process charts
  - 2. Lists and tables
- B. Knowledge of other types of illustrations

NOTE: Drawings and diagrams, photographs, blueprints, maps and exploded views should be exhibited to trainees.

- C. Quality and use of illustrations
- D. Practice in simple graph and chart making

TOPIC V. REPRODUCTION PROCESSES

- A. Review of stencil duplicators
- B. Review of fluid-process duplicators
- C. Offset duplicators
- D. Electronic facsimile copiers
- E. Photocopiers:
  - 1. Dry copying process
  - 2. Liquid-developer process
- F. Other reproduction processes:
  - 1. Thermographic
  - 2. Diffusion
  - 3. Electrostatic
  - 4. Diazo
  - 5. Stabilization
  - 6. Dual spectrum
  - 7. Dye transfer
- G. Relative desirability of machines:
  - 1. Cost of copying

2. The costs of misuse—
    a. Use of expensive machine and paper for short-term requirement
    b. Danger of reproduction of unauthorized materials (Color sensitization)
3. Kind and size of paper required—
    a. For the machine
    b. For the job
4. Time required—
    a. For making each copy
    b. For life of the paper

TOPIC VI. REVIEW OF OFFICE CALCULATORS

A. Review of types:
  1. Ten-key
  2. Rotary
  3. Printing and non-printing calculators
B. Practice in arithmetic functions

NOTE: Availability of machines will govern which are used.

TOPIC VII. PRACTICES USED IN ORDERING AND RECEIVING

A. Ordering supplies:
  1. Keeping inventories and other records
  2. Preparing and checking purchase requisitions
  3. Typing orders for purchasing supplies and equipment
B. Receiving supplies:
  1. Verifying correctness and condition of incoming packages
  2. Verifying correctness of bills received
  3. Storing for safe keeping of different materials

TOPIC VIII. APPLIED SECRETARIAL PRACTICES

A. Consideration of size and facilities of engineering office
B. Telephone review:
  1. Incoming and outgoing calls
  2. Reminders—
    a. Dating all memos and messages
    b. Transferring calls
    c. Using telephone directory
    d. Arranging for telephone coverage during absence of secretary
  3. Newer telephone equipment
C. Practice telephone-dictation about engineering equipment, bids, or proposals
D. Telegrams:
  1. Preparing telegrams
  2. Types of telegram to "file" for—
    a. Speediest dispatch
    b. Least expense
  3. Methods of "filing" messages—
    a. Tie lines
    b. Teleprinters
    c. Deskfax
    d. Telefax
    e. Intrafax
E. Practice in writing correct telegraphic messages about engineering tests, specifications, and proposals
F. Appointment calendars:
  1. Kinds of appointment records—
    a. Yearbook for executive
    b. Desk calendars
    c. Pocket date book (daily reminder)
    d. Ticklers and followup files
    e. Lists of recurring events
  2. Times to avoid scheduling appointments
G. Use of secretarial handbooks for reference

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Teachers are referred to the Office Machines—Computing and Duplicating, Secretarial Procedures and Practices, and Engineering Terminology—Dictation and Transcription units for additional references and materials.

AGNEW, PETER L.; MEEHAN, JAMES R.; AND OLIVERIO, MARY ELLEN. *Secretarial Office Practice, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

BEAMER, ESTHER K.; HANNA, J. MARSHALL; AND POPHAM, ESTELLE L. *Effective Secretarial Practices, 4th ed.* Cincinnati: South-Western, 1962. Workbook and Manual.

DORIS, LILLIAN, AND MILLER, BESSE M. *Complete Secretary's Handbook, 2nd ed. rev.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

GREGG, JOHN R., AND OTHERS. *Applied Secretarial Practice, 5th ed.* New York: McGraw-Hill, 1962.

LAIRD, ELEANOR S. *Engineering Secretary's Complete Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

LEE, DOROTHY; DICKINSON, TILLY; AND BROWER, WALTER. *Secretarial Practice for Colleges, 2nd ed.* New York: McGraw-Hill, 1965.

STAFFORD, ALISON R., AND CULPEPPER, BILLIE JEAN. *The Science-Engineering Secretary,* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

ORGANIC CHEMISTRY TERMINOLOGY—DICTATION AND TRANSCRIPTION

Specialized Skill for Scientific Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory: 2 hours daily Total: 120 hours

Description and Teaching Suggestions

This unit is designed to prepare advanced shorthand trainees to assist scientists and engineers working in organic chemistry and life sciences. Practice is given in taking dictation and transcribing correspondence, articles, and reports of an informational nature in the fields of hydrocarbons, petrochemicals, synthetic organic chemicals, and life sciences such as food chemistry, toxicology, pharmacology, and related biological fields.

For each topic, the trainee learns how to construct technical word forms by using technical prefixes and suffixes, and by combining forms. Shortcuts are presented for common words, chemical elements, and scientific or engineering terms. Special emphasis is placed on technical transcription. Trainees are taught preferred styles for typing technical reports with equations, formulae, abbreviations, and symbols. Practice is given in abstracting in shorthand and in transcribing technical reports and articles, in addition to typing from printed copy, rough draft, and handwritten copy. Teachers should use many chemistry journals for practice material and dictation exercises.

Teachers of this unit and the Scientific Typewriting unit should coordinate their activities to determine areas of concentration and/or reinforcement. If Scientific Typewriting is studied concurrently, portions of this unit, especially preparation of reports according to specified formats, can be deemphasized and concentration can be focused on the terminology, dictation, and transcription of usable transcript. If possible, a chemist or biologist should be invited late in the course to give report dictation thus lending realism to the unit work. Trainees should also be taught the importance of using special dictionaries and other scientific references.

Standards of Achievement

1. Transcribe dictation of scientific material, dictated at speeds between 100 and 120 wpm, with at least 95 percent accuracy.
2. Transcribe at a rate of 30 to 35 wpm to produce usable transcript with one carbon copy.

Prerequisites for Study of Organic Chemistry Terminology—Dictation and Transcription

General Office Education Units as suggested or demonstrated proficiencies equivalent to standards of achievement for those units.

Scientific Typewriting should be studied concurrently.

Physical Sciences Terminology–Dictation and Transcription may be studied concurrently.

Topic Outline

I. Hydrocarbon–Petrochemical Terminology
II. Synthetic Organic Chemical Terminology
III. Life Sciences Terminology

TOPIC I. HYDROCARBON-PETROCHEMICAL TERMINOLOGY

A. Dictation and transcription of reports and articles dealing with the chemistry of petroleum, as well as the materials, products, and processes of chemical production
B. Review of typing the Greek alphabet
C. Review of typing simple equations containing the major mathematical symbols (see Scientific Typewriting)

TOPIC II. SYNTHETIC ORGANIC CHEMICAL TERMINOLOGY

A. Dictation and transcription of correspondence and articles relating to man-made fibers, medical supplies, equipment, and plastic products
B. Review of mathematical abbreviations
C. Review of typing superscripts and subscripts for formulae and equations

TOPIC III. LIFE SCIENCES TERMINOLOGY

A. Dictation and transcription of articles and correspondence concerning fermentation chemistry, pharmaceuticals, foods, agriculture, toxicology, botany, and other biological sciences
B. Dictation and transcription of lists of tables and illustrations for technical reports

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Other materials appropriate for dictation may be taken from professional chemistry journals.

Adams, Dorothy, and Kurtz, Margaret. *The Technical Secretary.* New York: McGraw-Hill, 1967.
Dunford, Nelson James. *A Handbook for Technical Typists.* New York: Gordon and Breach, 1964.
Hawley, Gessner G., and Hawley, Alice W. *Hawley's Technical Speller.* New York: Reinhold, 1964.
Honig; Jacobs; Lewis; Monrath; and Murphy, Editors. *The Van Nostrand Chemist's Dictionary.* Princeton, N.J.: D. Van Nostrand, 1953.
Laird, Eleanor S. *Engineering Secretary's Complete Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.
Rose, Arthur, and Rose, Elizabeth. *The Condensed Chemical Dictionary, 6th ed.* New York: Reinhold, 1961.
Stafford, Allison R., and Culpepper, Billie Jean. *The Science-Engineering Secretary,* Englewood Cliffs, N.J.: Prentice-Hall, 1963.
Tweney, C. F., and Hughes, L. E. C., Editors. *Chamber's Technical Dictionary.* New York: Macmillan, 1958.

PHYSICAL SCIENCES TERMINOLOGY—DICTATION AND TRANSCRIPTION

Specialized Skill for Scientific Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily Total: 120 hours

Description and Teaching Suggestions

This unit is designed to prepare advanced shorthand trainees to assist scientists and engineers working in the physical sciences. Practice is given in taking dictation and transcribing letters, articles, and reports in the fields of electronics, aerospace, communications, and nucleonics.

The trainee learns how to construct technical outlines fluently by using technical prefixes and suffixes, and by combining forms. Shortcuts are presented for common words, chemical elements, and scientific and engineering terms. Special emphasis is placed on number and symbol usage in technical transcription. Trainees are acquainted with preferred styles for typing technical reports with equations and formulae as well as mathematical signs, symbols, and abbreviations. Practice should be provided in abstracting in shorthand and transcribing technical reports and articles, in addition to typing from printed, rough draft, and handwritten copy. If Scientific Typewriting is studied concurrently, the typing portion of this unit relating to special symbols, superscripts, subscripts, mathematical signs, equations, and formulae can be deemphasized and concentration placed on the accuracy of transcription.

Teachers of Scientific Typewriting and this unit should coordinate their presentations closely. Although only four areas of terminology are shown in the outlines, teachers may adjust the content to suit the needs of the particular locale or the trainees' interests. Much specialized terminology will be learned on the job. If a scientist can be invited to dictate a portion of a report with special instructions, a greater degree of realism will be provided. The teacher should have professional journals in the physical sciences for dictation practice.

Standards of Achievement

1. Transcribe dictation, with at least 95 percent accuracy, of physical science material dictated at speeds between 100 and 120 wpm.
2. Transcribe at a rate of 30 to 35 wpm to produce usable transcript with one carbon copy.

Prerequisites for Study of Physical Sciences Terminology—Dictation and Transcription

General Office Education Units as suggested or demonstrated proficiencies equivalent to standards of achievement for those units.

Scientific Typewriting should be studied concurrently.

Organic Chemistry Terminology—Dictation and Transcription may be studied concurrently.

Topic Outline

I. Aerospace Terminology
II. Electronics Terminology
III. Communications Terminology
IV. Nucleonics Terminology

TOPIC I. AEROSPACE TERMINOLOGY

A. Dictation and transcription of reports and articles relating to manned and unmanned flight vehicles, missiles, weather satellites, navigational devices, and guidance systems
B. Dictation and transcription of the body of a technical report

C. Procedure for typing equations and formulae (or review from Scientific Typewriting)

TOPIC II. ELECTRONICS TERMINOLOGY

A. Dictation and transcription of reports and articles relating to electronic components and to applications of electronics in the fields of radio, television, and radar

B. Typing an appendix for a technical report

C. Typing enclosing brackets, summation, product, integral, and square root symbols for equations and formulae (or review from Scientific Typewriting)

TOPIC III. COMMUNICATIONS TERMINOLOGY

A. Dictation and transcription of reports and articles concerning communications by satellite, optics, microwave transmission, underseas cables, and data processing

B. Typing the bibliography for a technical report

C. Presentation of spacing equations and formulae (or review from Scientific Typewriting)

TOPIC IV. NUCLEONICS TERMINOLOGY

A. Dictation and transcription of correspondence, articles, and reports relating to the nature of atomic energy and its applications

B. Typing the index and distribution sheets for a technical report

C. Presentation of preferred punctuation for equations and formulae

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Teachers are referred to the listings under Engineering Terminology—Dictation and Transcription for additional material.

ADAMS, DOROTHY, AND KURTZ, MARGARET. *The Technical Secretary.* New York: McGraw-Hill, 1967.

DUNFORD, NELSON JAMES. *A Handbook for Technical Typists.* New York: Gordon & Breach, 1964.

HAWLEY, GESSNER G., AND HAWLEY, ALICE W. *Hawley's Technical Speller.* New York: Reinhold, 1964.

LAIRD, ELEANOR S. *Engineering Secretary's Complete Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

MICHELS, WALTER C., EDITOR-IN-CHIEF. *Dictionary of Physics and Electronics.* Princeton, N.J.: D. Van Nostrand.

STAFFORD, ALLISON R., AND CULPEPPER, BILLIE JEAN. *The Science-Engineering Secretary,* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

FOREIGN-LANGUAGE SHORTHAND I

Specialized Skill for Foreign-Language Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory (or Study): 1 hour daily Total: 90 hours

Description and Teaching Suggestions

Designed for trainees who have finished or are currently studying advanced shorthand and typing, this unit will introduce the trainee to shorthand in the foreign language of choice. Trainees will learn outlines for sounds that are peculiar to the chosen language, together with typewriter usage which is uniquely employed for that language. In practice sessions, stress is placed on facility in writing and on accuracy of the shorthand outlines and, later, on typewritten transcription.

The use of modern audio teaching devices by the teacher is suggested to achieve uniform and proper speed control of dictated material.

Standards of Achievement

1. Take foreign-language dictation, given at speeds between 60–70 wpm, and transcribe with at least 95 percent accuracy.
2. Type at a rate of 40–50 wpm.
3. Transcribe at a rate of 15–20 wpm to produce mailable transcript with one carbon copy.

Prerequisites for Study of Foreign-Language Shorthand I

Speed Dictation and Transcription.

Demonstrated proficiencies equivalent to standards of achievement for the above unit are also acceptable.

Mastery of foreign language.

Topic Outline

I. Basic Strokes, Outlines, and Diphthongs

II. Peculiarities of Business Letters in Foreign Language

III. Introduction to Phrases and Brief Forms
IV. Diphthongs, Brief Forms, and Phrases
V. Typing Tabulations in Foreign Language
VI. Suffixes, Prefixes, and Derivatives

TOPIC I. BASIC STROKES, OUTLINES, AND DIPHTHONGS

A. Presentation of basic strokes used in shorthand
B. Introduction of diphthongs

TOPIC II. PECULIARITIES OF BUSINESS LETTERS IN FOREIGN LANGUAGE

A. Letter styles of the foreign country
B. Typing letters from typed rough draft
C. Typing letters from longhand draft

TOPIC III. INTRODUCTION TO PHRASES AND BRIEF FORMS

TOPIC IV. DIPHTHONGS, BRIEF FORMS, AND PHRASES

A. Continuation of presentation of diphthongs
B. Continuation of brief forms and phrases

TOPIC V. TYPING TABULATIONS IN FOREIGN LANGUAGE

TOPIC VI. SUFFIXES, PREFIXES, AND DERIVATIVES

A. Introduction of suffixes
B. Introduction of prefixes
C. Brief form derivatives

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional references are listed in Appendix D.

ACUÑA MONTENEGRO, JOSE R. *Correspondencia y Documentacion Comercial Moderna.* New York: McGraw-Hill, 1955.

BRIGGS, MILTON (TRADUCCION DE MA. EUGENIA JIMENO). *Gimnasio de Aritmetica.* Cincinnati: South-Western, 1965. Manual.

CHAFFURIN, L., AND MERGAULT, J. *Dictionaire Francais-Anglais.* Paris, France: Librairie Larousse.

FERRARI, A. D., ET AL. *Técnica Mecanográfica, Curso Vocacional Elemental, Segunda Edicion.* Cincinnati: South-Western, 1956.

DE GORBEA, JOSEFINA Q., ET AL. *Técnicas Mecanográficas Modernas, Segunda Edicion.* New York: McGraw-Hill, 1957.

GREGG, JOHN R.; TORREBLANCA, ILDEFONSO; AND HAELSIG, OTTO H. *Auxiliar de la Taquigrafia Gregg Simplificada con Clave.* New York: McGraw-Hill, 1957. Clave.

———. *Diccionario de la Taquigrafia Gregg Simplificada.* New York: McGraw-Hill, 1953.

———. *Estudios de Rapidez en Taquigrafia Gregg Simplificada.* New York: McGraw-Hill, 1954.

———. TAQUIGRAFIA GREGG SIMPLIFICADA. New York: McGraw-Hill, 1953.

HAUTEFEUILLE, A. *Cours Complet de Dactylographie, 6th Edition.* Paris, France: Classiques Hachette.

KREDER, A. *Cours Complet Dactylographie, Methode Kreder, 2nd Edition.* Paris, France: Foucher.

DE LA LUZ, ANTONIO, AND LLEDO, MARINA. *Contabilidad Practica Para el Siglo XX.* Cincinnati: South-Western, 1960. Workbook and Manual.

MUNIZ, ALFREDO, AND DE GORBEA, JOSEFINA Q. *Sistemas y Metodos de Archivar.* Cincinnati: South-Western, 1952. Practica de Archivar para Oficinas y Manual.

SOEUR MARIE-ERNESTINE, S. S. A. *Stenographie Gregg Simplifiee, Deuxieme Edition.* New York: McGraw-Hill, 1962.

———. *Transcription Stenographie Gregg Simplifiee, Deuxieme Edition.* New York: McGraw-Hill, 1962.

———. *Exercices de Stenographie Gregg Simplifiee, Deuxieme Edition.* New York: McGraw-Hill, 1962.

SOEUR MARY DE BETHLEHEM. *Dictionaire de la Gregg Simplifiee.* New York: McGraw-Hill, 1961.

SORELLE, RUPERT P.; SMITH, HAROLD H.; AND CASTIELLO, JOSEFINA. *Mecanografia Metodo Racional. Segunda Edicion, Revísada.* New York: McGraw-Hill, 1962.

DE URIBE, MARTA D., AND DE CHARNECO, AMALIA L. *Tecnicas Modernas de Archivo.* New York: McGraw-Hill, 1960.

DE URIBE, MARTA D.; DE CHARNECO, AMALIA L.; DE MENDES, FELICITA R. *Practicas de Oficina.* New York: McGraw-Hill, 1960.

WANOUS, S. J., AND WANOUS, EDWARD E. (traduccion de Alajandro Prieto). *La Automatizacion del Trabajo de Oficina.* Cincinnati: South-Western, 1964. Student Practice Set and Manual.

FOREIGN-LANGUAGE SHORTHAND II

Specialized Job Skill for Foreign-Language Stenographers and Secretaries

Hours Class: 1 hour daily; Laboratory: 1 hour daily **Total: 90 hours**

Description and Teaching Suggestions

Through dictation and transcription of correspondence and reports in the foreign language, the trainee develops speed and accuracy. The trainee should also develop proficiency in the correct typing forms of telegrams, reports, minutes of a meeting, and manuscripts in the foreign language.

Intensive dictation exercises will help the trainee to develop high speed in taking dictation of correspondence and reports in foreign language and increase his transcription rate. Typing translation practice from English to the foreign language and from the foreign language to English, as well as typing reports and manuscripts in foreign language from longhand drafts are part of the laboratory skill development program.

Standards of Achievement

1. Take dictation in foreign language given at speeds between 80–90 wpm and transcribe with at least 95 per cent accuracy.
2. Type at the rate of 50–60 wpm.
3. Transcribe at the rate of 25 wpm or better to produce mailable transcripts with one carbon copy.

Prerequisites for Study of Foreign-Language Shorthand II

Foreign Language Shorthand I or demonstrated equivalent proficiency in foreign language stenographic work. Concurrent work in advanced shorthand and production typing.

Topic Outline

I. Blends, Prefixes, and Suffixes
II. Typing Business Forms in Foreign Language
III. Word Endings, Derivatives, and Prefixes
IV. Prefixes, Suffixes, and Intersections
V. Typing Foreign Language Reports and Manuscripts
VI. Translation Practice

TOPIC I. BLENDS, PREFIXES, AND SUFFIXES
A. Introduction of blends
B. Continuation of prefixes
C. Continuation of suffixes

TOPIC II. TYPING BUSINESS FORMS IN FOREIGN LANGUAGE
A. Telegrams
B. Bills and invoices
C. Minutes of meetings
D. Reports and manuscripts

TOPIC III. WORD ENDINGS, DERIVATIVES, AND PREFIXES
A. Introduction of word endings
B. Continuation of brief form derivatives
C. Continuation of prefixes

TOPIC IV. PREFIXES, SUFFIXES, AND INTERSECTIONS
A. Continuation of suffixes
B. Continuation of prefixes
C. Presentation of intersections
D. Presentation of cities and states

TOPIC V. TYPING FOREIGN LANGUAGE REPORTS AND MANUSCRIPTS
A. From typed drafts
B. From longhand drafts

TOPIC VI. TRANSLATION PRACTICE
A. Reports and correspondence from English to foreign language
B. Reports and correspondence from foreign language to English

Texts and Other Teaching Materials

The suggested texts and other teaching materials listed under Foreign-Language Shorthand I are equally applicable to this unit.

SCHOOL SYSTEM PRACTICES AND ADMINISTRATION

Environmental Knowledge for Educational Secretaries

Hours **Class: 1 hour daily** **Total: 30 hours**

Description and Teaching Suggestions

In this unit the trainee will study those aspects of school administration that are basic to an understanding of the operation of an education system. The discussions should be on a "need to know" basis and limited to the effects of school system practices on the work of the secretary. Since this unit is essentially for guidance and enrichment, it is suggested that it be studied concurrently with Education Office Records and Procedures. A school administrator should be invited to talk to the class about school system operation. Achievement by the trainee can be judged by written tests.

Standards of Achievement

Knowledge of school system practices and administration as judged by written tests.

Prerequisites for Study of School System Practices and Administration

General Office Education Units as suggested, or demonstrated proficiencies equivalent to standards of achievement for those units.

Education Office Records and Procedures should be studied concurrently.

Topic Outline

I. School Financing
II. Staffing Problems
III. Class Scheduling
IV. Equipment and Supply Management
V. Maintenance of Plant and Equipment
VI. Student Services
VII. Personnel Policies

TOPIC I. SCHOOL FINANCING

A. Procurement of funds
B. Accounting
C. Disbursement
D. Budget preparation
E. Payroll preparation
F. Insurance funds
G. Retirement plans
H. Salary administration

TOPIC II. STAFFING PROBLEMS

A. Recruitment
B. Selection
C. Advancement
D. Relations with faculty and other personnel
E. Discipline of faculty
F. Termination of contracts

TOPIC III. CLASS SCHEDULING

A. Staff
B. Space

TOPIC IV. EQUIPMENT AND SUPPLY MANAGEMENT

A. Requisitions
B. Purchases
C. Inventories

TOPIC V. MAINTENANCE OF PLANT AND EQUIPMENT

A. Control of cost
B. Requisitions for purchase and replacement
C. Maintenance personnel (custodian, porters, etc.)

TOPIC VI. STUDENT SERVICES

A. Transportation
B. School safety
C. Food
D. Health
E. Testing

TOPIC VII. PERSONNEL POLICIES

A. Attendance
B. Retirement
C. Morale
D. Supervision and evaluation
E. Faculty teaching load

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit.

HARRIS, BEN J. *Supervisory Behavior in Education.* Englewood Cliffs, N.J.: Prentice-Hall, 1963.

HUNT, HAROLD C., AND PIERCE, PAUL R. *The Practice of School Administration.* Boston: Houghton Mifflin, 1958.

MILLER, JAY, AND HAMILTON, WILLIAM. *The Independent Business School in American Education.* New York: McGraw-Hill, 1964.

MOORE, HAROLD E., AND WALTERS, N. B. *Personnel Administration in Education.* New York: Harper and Brothers, 1955.

MOORE, HOLLIS A., JR. *Studies in School Administration.* Washington: American Association of School Administrators, 1957.

MORT, PAUL R.; REUSSER, W. C.; AND POLLEY, J. W. *Public School Finance.* New York: McGraw-Hill, 1960.

ROE, WILLIAM H. *School Business Management.* New York: McGraw-Hill, 1961.

TEAD, ORDWAY. *Administration: Its Purpose and Performance.* New York: Harper and Brothers, 1959.

THE UNIVERSITY OF THE STATE OF NEW YORK. *Purchases and Stores Handbook.* Albany, N.Y.: The State Education Department, 1955.

VILES, N. E. *School Plant Management Bibliography.* Washington: U.S. Department of Health, Education, and Welfare, 1959.

EDUCATION OFFICE RECORDS AND PROCEDURES

Specialized Functional Requirement for Education Secretary

Hours Class: 2 hours daily

Total: 60 hours

Description and Teaching Suggestions

In this unit the trainee will have an opportunity to apply secretarial skills to the specific procedures of a school, college, or board of education office. Class presentations and discussions should center around the ways in which school office procedures vary from other types of offices. Although some practices will vary among education offices, emphasis should be placed on the underlying principles common to all such offices. Most of the possible education office duties will be covered so that trainees can be employed in a variety of educational offices. The trainee will be given opportunities to practice shorthand, transcription, and statistical typewriting as applied to educational records and other activities. Attention will also be given to developing an understanding of how automatic data processing can assist in school operations. Trainees should be given a tour of the education office of a local school or college. It is suggested that as many simulated work-experience projects be provided for trainee practice as time allows.

Standards of Achievement

1. Answer routine school correspondence.
2. Prepare and type various school reports, schedules, bids, and proposals under supervision.
3. Greet visitors, schedule appointments, and promote good public relations.
4. Recognize and cooperate with local civic groups.
5. Handle sundry details of student activities as assigned.
6. Know how to locate all school personnel.
7. Know from whom to request assistance for school activities and emergencies.

Prerequisites for Study of Education Office Records and Procedures

General Office Education Units as suggested or demonstrated proficiencies equivalent to standards for those units.

School System Practices and Administration should be studied concurrently.

Topic Outline

I. Responsibilities toward Administrators
II. Contacts with General Public
III. Secretary-Student Activities
IV. Records To Be Kept
V. Relationships with School Personnel
VI. Other Secretarial Duties
VII. Factors in Professional Growth

TOPIC I. RESPONSIBILITIES TOWARD ADMINISTRATORS

A. Transcription:
    1. Ordinary correspondence
    2. Reports
    3. Memoranda and announcements
    4. Minutes of meetings
B. Letter writing:
    1. Routine letters
    2. Letters relating to admissions
    3. Letters confirming and canceling appointments
    4. Order letters
C. Report preparation:
    1. Materials to be collected
    2. Methods of analyzing data
    3. Typewriting form—
        a. Formal
        b. Informal
        c. Official forms used by school systems
D. Reception duties:
    1. Handling appointment schedules
    2. Screening of callers
    3. Reception of visitors
E. Preparation of bids, budgets, and proposals

TOPIC II. CONTACTS WITH GENERAL PUBLIC

A. Telephone duties:
    1. Using good telephone techniques
    2. Recording calls
    3. Handling requests for information and complaints
    4. Relaying messages to faculty, students, and other school personnel
    5. Preparing lists of frequently used numbers
    6. Making emergency calls—fire, hospital, etc.
B. Methods of promoting good public relations
C. Cooperation with PTA and other outside groups

TOPIC III. SECRETARY-STUDENT ACTIVITIES

A. Receiving and registering new students
B. Processing college applications
C. Ranking students
D. Handling students sent to office
E. Issuing permits needed in school
F. Locating students
G. Cooperating in furthering extra-curricular activities
H. Using public-address system
I. Preparing bus schedules
J. Issuing tickets for cafeteria and school functions

TOPIC IV. RECORDS TO BE KEPT

A. Schedules to be handled:
    1. Faculty

    2. Bells
    3. Nurse, visiting teachers, and all special teachers
    4. Fire drill, air raid signals, and lines of march
    5. Monitorial
    6. Bus
- B. Group insurance—policies and claims:
    1. Student
    2. Staff
- C. Student records:
    1. Attendance
    2. Admission and withdrawals during semester
    3. Grade reports
    4. Data on non-resident students
    5. Health and testing
- D. School personnel records:
    1. Attendance
    2. Salary schedules
    3. Evaluations
- E. Payrolls
- F. Financial records
- G. Data for school research projects
- H. General correspondence
- I. Requisitions and inventories:
    1. Furniture
    2. Supplies—office, instructional, janitorial
    3. Equipment
    4. Repairs
    5. Alterations and permanent improvements
    6. Textbooks

TOPIC V. RELATIONSHIPS WITH SCHOOL PERSONNEL

- A. Calling substitutes
- B. Dispatching notices to faculty and students
- C. Handling faculty relations
- D. Interpreting policy
- E. Routing mail
- F. Contacting maintenance personnel

TOPIC VI. OTHER SECRETARIAL DUTIES

- A. Using office equipment:
    1. Adding and calculating machines
    2. Photocopy machines
    3. Fluid duplicators
- B. Preparing materials for automatic data processing
- C. Typing statistical material
- D. Safeguarding various funds
- E. Requisitioning supplies and equipment
- F. Ordering books
- G. Handling lost-and-found facilities
- H. Preparing directories:
    1. Faculty
    2. Student
    3. Organizations
- I. Keeping schedules of school activities

TOPIC VII. FACTORS IN PROFESSIONAL GROWTH

- A. Developing desirable personal traits
- B. Continuing education
- C. Participating in professional associations

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Secretarial Procedures and Practices and in Appendix D.

Agnew, Peter L., and Cornelia, Nicholas J. *Office Machines Course, 3rd ed.*, Cincinnati: South-Western, 1962. Manual.

Beamer, E. K.; Hanna, J. M.; and Popham, E. *Effective Secretarial Practices, 4th ed.* Cincinnati: South-Western, 1962.

Carlson, Paul A.; Forkner, Hamden L.; and Boynton, Lewis D. *20th Century Bookkeeping and Accounting, 22nd ed., First-Year Course.* Cincinnati: South-Western, 1962. Workbooks, Practice Sets, Achievement Tests, Key, and Manual.

Doris, L., and Miller, B. M. *Complete Secretary's Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Freeman, M. H.; Hanna, J. M.; and Kahn, Gilbert. *Gregg Bookkeeping and Accounting, 3rd ed.* New York: McGraw-Hill, 1963.

Hadley Editorial Staff and Thistlethwaite, Robert L. *Payroll Recordkeeping, 7th ed.* New York: McGraw-Hill, 1965. Enveloped Booklets, Business Papers and Reports, and Teacher's Key.

Halacy, D. S., Jr. *Computers.* New York: Harper and Row, 1962.

Handbook of Advanced Secretarial Techniques, The. Englewood Cliffs, N.J.: Prentice-Hall, 1962.

Huffman, Harry; Mulkerne, Donald; and Russon, Allien. *Office Procedures and Administration—College Course.* New York: McGraw-Hill, 1965.

Hutchinson, Lois. *Standard Handbook for Secretaries, 7th ed.* McGraw-Hill, 1956.

IBM Personal Study Program. *Punched Card Data Processing Principles.* New York: IBM Corp., 1961.

Lee, Dorothy E.; Dickinson, T. S.; and Brower, W. A. *Secretarial Practice for Colleges, 2nd ed.* New York: McGraw-Hill, 1965.

Mayo, Lucy G. *Communications Handbook for Secretaries.* New York: McGraw-Hill, 1958.

National Association of Educational Secretaries. *Plan Your Work—A Handbook on How To Work Smarter Not Harder.* Washington: National Association of Educational Secretaries.

National Association of Educational Secretaries can provide teachers with a list of other specific useful materials available from their offices.

101 Office Shortcuts. West Nyack, N.Y.: Parker Publishing Co., 1964.

PENDERY, JOHN A. *Clerical Payroll Procedures, 4th ed.* Cincinnati: South-Western, 1962. Manual.

PLACE, IRENE, AND HICKS, CHARLES. *College Secretarial Procedures, 3rd ed.* New York: McGraw-Hill, 1965.

ROBERT, HENRY M. *Rules of Order.* Chicago: Scott, Foresman, 1956.

RUSSON, ALLIEN R. *Business Behavior, 3rd ed.* Cincinnati: South-Western, 1964.

Secretaries on the Spot. Kansas City, Mo.: The National Secretaries Association (International), 1961.

The Successful Secretary. West Nyack, N.Y.: Parker Publishing Co., 1964.

WANOUS, S. J., AND WANOUS, EDWARD E. *Automation Office Practice.* Cincinnati: South-Western, 1964. Manual.

WANOUS, S. J.; WANOUS, EDWARD E.; AND HUGHES, J. *Introduction to Automated Data Processing.* Cincinnati: South-Western, 1967.

PROCEDURES WRITING

Functional Requirement for Executive Secretaries

Hours **Class: 1 hour daily** **Total: 15 hours**

Description and Teaching Suggestions

This intensive unit is designed to acquaint executive secretarial trainees with the nature and purpose of written procedures and to teach the elements of procedures writing and procedures manual organization and control. Executive secretaries often may assist their employer to compile and write procedures.

Since procedures writing is a special type of business writing, this unit can very well be integrated with Business Reports. Trainees may also study this unit in conjunction with Forms Design. The emphasis in this unit should be on *practice* in procedures writing. It is suggested that teachers prepare information to be put into procedure form and assign this to the trainees.

Standards of Achievement

1. Write acceptable procedures for a variety of work situations as assigned.
2. Compile and organize simple procedures manuals.

Prerequisites for Study of Procedures Writing

General Office Education Units as suggested in the *Curricula Synopses* section or demonstrated proficiencies equivalent to standards of achievement for those units.

Several years of secretarial experience will be acceptable for those trainees who wish to upgrade skills.

Forms Design may be studied concurrently.

Topic Outline

I. The Purpose and Nature of Written Procedures
II. Preparation of Procedure Statements
III. Organizing Procedures Manuals
IV. Physical Appearance of a Manual
V. Distribution of Manuals

TOPIC I. THE PURPOSE AND NATURE OF WRITTEN PROCEDURES

A. Purpose of written directives
B. Types of written procedures:
    1. How to perform a job
    2. How to process a form
    3. How to request a service
    4. How to reach an objective
C. Problems of preparing and communicating procedures:
    1. Readability
    2. Approval
    3. Training in use of procedures
    4. Exceptions
    5. Revisions
    6. Distribution
D. Criteria of a good written procedure:
    1. Utility
    2. Clarity and simplicity for understanding
    3. Brevity
E. Terms used in procedures writing:
    1. Policy
    2. Procedures
    3. Practices
    4. Rules
    5. Directives, bulletins, circulars, memos, manuals

TOPIC II. PREPARATION OF PROCEDURE STATEMENTS

A. Principles used in procedures writing:
    1. Standard format of presentation
    2. Direct and easily read language

   3. Word economy
   4. Simple imperative sentences
   5. Completeness of information
   6. Logical sequence of instructions—
      a. A section for each complete procedure
      b. Subsections for each worker or work station
   7. Supplements of organization charts, flow diagrams, and forms
   8. Acceptance by others
   9. Editing and revision
   10. Use of a trained procedures writer

B. Numbering systems:
   1. Purpose (identification)
   2. Types of numbering systems
   3. Numbering of—
      a. Procedures
      b. Instructions
      c. Work stations

C. Approval:
   1. Responsibility for first draft
   2. Circulation for criticism and revision
   3. Final agreement
   4. Signatures

D. Revisions

TOPIC III. ORGANIZING PROCEDURES MANUALS

A. Contents of manuals:
   1. Table of contents
   2. Foreword
   3. Instructions in use of manual
   4. Statement of supporting policies
   5. Statements of the procedures
   6. Sample completed forms
   7. Appendix
   8. Index
   9. Letter of transmittal

B. Grouping of topics:
   1. Sectional headings
   2. Coding
   3. Tabbing by topic

C. Types of manuals:
   1. Administrative, management, or supervisory
   2. Branch office
   3. Correspondence
   4. Office or clerk's
   5. Organization or company
   6. Personnel or salary administration
   7. Policy
   8. Service
   9. Standard operating procedures

D. Manual titles

TOPIC IV. PHYSICAL APPEARANCE OF A MANUAL

A. Criteria for determining a manual's physical composition:
   1. Where will manual be kept
   2. How will it be used
   3. How often must material be removed or inserted
   4. How much can be spent on the manual
   5. What is binder mechanism
   6. What is cover material

B. Format for procedure statements:
   1. Margins
   2. Dividers
   3. Style
   4. Numbering system
   5. Color

C. Duplicating processes

TOPIC V. DISTRIBUTION OF MANUALS

A. Controls over distribution:
   1. Who is authorized to receive
   2. When may they be used outside the company
   3. Who authorizes distribution outside the company

B. Availability to non-supervisory personnel

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional references are listed in Appendix D.

HAGA AND SCHRICKER. *Procedures and Procedure Manuals—Ideas for Management.* Cleveland: Systems and Procedures Association, 1964.

JOHNSON, H. WEBSTER. *How To Use the Business Library, 3rd ed.* Cincinnati: South-Western, 1964.

KEITHLEY, ERWIN M. *A Manual of Style for the Preparation of Papers and Reports.* Cincinnati: South-Western, 1959.

MATTHIES, LESLIE. *The Management Role of a Procedures Manual—Ideas for Management.* Cleveland: Systems and Procedures Association, 1963.

———. *The Playscript Procedures: A New Tool of Administration.* New York: Office Publications, 1961.

NATIONAL INDUSTRIAL CONFERENCE BOARD. *Personnel Procedure Manuals, A Research Report from the Conference Board.* New York: National Industrial Conference Board, Inc., 1961.

PLACE, IRENE, AND POPHAM, ESTELLE L. *Filing and Records Management.* Englewood Cliffs, N.J.: Prentice-Hall, 1966. (Chapter 18).

RONAYNE, MAURICE F. *Twenty Tips for Issuing a Procedures Manual.* Cleveland: Systems and Procedures Association, 1959.

ROSS, JOHN H. *How To Make a Procedure Manual.* Miami, Fla.: Office Research Institute, 1956.

FORMS DESIGN

Functional Requirement for Executive Secretaries

Hours **Class: 1 hour daily** **Total: 20 hours**

Description and Teaching Suggestions

This short unit is designed to teach executive secretarial trainees to analyze and design forms and to inform the trainees about the importance of this work in government and business. Forms design is usually one aspect of a company-wide forms control program which may be performed by a central staff specialist. When control is not centralized, various employees throughout the firm will probably design forms. Executive secretaries may be called upon by their employers to design a form to obtain special information. Emphases in this unit should be placed on practice in design of simple forms related to the work needs of the trainee or answering needs in class problems, and in developing an understanding of the need for professional assistance in forms design. The content should be oriented to the "doing" aspect rather than merely acquiring the knowledge. This unit can be coordinated with Procedures Writing for experienced executive secretaries who desire to upgrade skills. Trainee evaluation can be made by tests on factual information and by teacher observation.

Standards of Achievement

1. Design simple, useful forms for use in the office for recording a variety of information needed by the employer.
2. Demonstrate fundamental skills in good form design.

Prerequisites for Study of Forms Design

General Office Education Units as suggested, demonstrated proficiencies equivalent to standards of achievement for those units, or several years of secretarial experience.

Topic Outline

I. Introduction to Forms Design
II. The Standard Aspects of a Form
III. The Working Area on a Form
IV. Forms Construction
V. Forms Production
VI. Forms Analysis
VII. Forms Management Program

TOPIC I. INTRODUCTION TO FORMS DESIGN

A. Definition of forms
B. Importance of forms:
  1. Nature of a business form
  2. When to use forms
C. Necessity for careful forms design
D. Groundwork before designing a form:
  1. Knowledge of purpose
  2. Organized list of items of information needed (constant and variable)
  3. Flow diagram
  4. Forms distribution chart
  5. Machines and types of files or binders used
E. Samples of various types of forms:
  1. Snap out and one-time carbon
  2. Punched card
  3. Odd-sized
  4. Regular such as checks, application blanks, and letterheads
  5. Continuous
F. Classification of forms by function

TOPIC II. THE STANDARD ASPECTS OF A FORM

A. Identification:
  1. Title and subtitle
  2. Form number
B. Control:
  1. Edition date
  2. Control symbols
  3. Instructions for filling and dispatching
  4. Identification for routing each copy
C. Size, margins, and fill-in method
D. Mailing:
  1. Window envelope alignment
  2. Self-mailers
E. Filing problems related to size and material

TOPIC III. THE WORKING AREA ON A FORM

A. Continuity of the parts:
  1. Identification: who, where, when, why
  2. Specifications: what, how much
  3. Authorization: who authorized
B. Data flow:
  1. Left to right
  2. Top to bottom
  3. Straight-line concept

- C. Layout:
    1. Homogeneous groupings
    2. Sequence of items with source document
    3. Sequence to correspond to subsequent records
    4. Location of items for reference
    5. Check-off items

TOPIC IV. FORMS CONSTRUCTION

- A. Rough draft:
    1. Form design guide sheets
    2. Grouping and sequencing items
    3. Computing space requirements
- B. Construction:
    1. Number of copies
    2. Type of carbon
    3. Size
    4. Lines
    5. Boxes
    6. Space requirements
- C. Construction of various forms:
    1. Loose forms with inter-leaved (or non-smear) carbons
    2. Padded forms
    3. Continuous fanfold forms
- D. Single-part or multiple-part forms:
    1. Perforations or scorings
    2. Special block outs

TOPIC V. FORMS PRODUCTION

- A. Printing specifications:
    1. Paper (weight, color, size, grade)
    2. Ink
    3. Number of printed sides
    4. Rounded or square corners
    5. Type size and style
    6. Carbon copies and their registration
    7. Binding
    8. Punching
    9. Sequential or serial numbering
    10. Folding
    11. Quantity
- B. Printing or duplicating process
- C. Proofs
- D. Delivery:
    1. Schedule
    2. Shipping instructions
- E. Stocking, distribution, and replenishment

TOPIC VI. FORMS ANALYSIS

- A. What analysis involves:
    1. Purpose and use of the form
    2. Classifications
    3. Information gathering
    4. Collection of filled forms
    5. Thoughtful observation
- B. Results or goals of forms analysis:
    1. Simplification
    2. Elimination of duplication and waste
    3. Control
    4. Cost reduction
    5. Increased efficiency
    6. Better forms design
    7. Improved integration of departmental forms

TOPIC VII. FORMS MANAGEMENT PROGRAM

- A. Goals of a forms management program
- B. Centralized forms file and its use
- C. Forms personnel:
    1. Forms design personnel
    2. Program director, negotiator, and consultant
    3. On-line departmental representatives
- D. Operating a forms management program

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

CADMUS, WESLEY S. *A Forms Manual.* Hartford, Conn.: Wesley S. Cadmus, 1962.

MARIEN, ROY, *Marien on Forms Control.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

MYERS, GIBBS. *Forms Design and Control, Systems and Procedures.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

NATIONAL ARCHIVES AND RECORDS SERVICE. *Forms Analysis.* Washington: General Services Administration, 1960.

———. *Forms Design.* Washington: General Services Administration, 1960.

PLACE, IRENE, AND HICKS, CHARLES. *Office Management, 2nd ed.* Boston: Allyn and Bacon, Inc., 1962.

SADAUSKAS, WALLACE B. *Manual of Business Forms.* New York: Office Publications, Inc., 1961.

RECORDS MANAGEMENT

Specialized Functional Requirement for Executive Secretaries

Hours Class: 1 hour daily — Total: 20 hours

Description and Teaching Suggestions

This unit is designed to make trainees aware of the scope of records management. It introduces them to the need for records management programs in government and industry and to the dimensions of a full-fledged program in a firm. This unit can be coordinated with the units on Forms Design and Procedures Writing. Executive secretaries may assist executives or may personally set up and maintain records management programs in smaller firms. Much of this unit should be devoted to class discussion. Lectures by the teacher or professional records management people are suggested. Emphasis should be placed on actual exercises in those areas of the subject that call for skill development. Objective tests can be used to evaluate the trainee's acquisition of subject knowledge.

Standards of Achievement

1. Demonstrate knowledge of purpose and scope of records management programs.
2. Demonstrate knowledge of the details, procedures, and methods used in setting up records management programs and the various types of equipment that may be used advantageously.
3. Demonstrate ability to develop retention schedules.

Prerequisites for Study of Records Management

Several years of experience in responsible secretarial assignments.

Topic Outline

I. Records Management (General)
II. The Parts of a Records Management Program
III. Developing and Maintaining a Records Management Program
IV. Records Surveys
V. Supplies and Equipment
VI. Protection of Records
VII. Automated Equipment in a Records Management Program

TOPIC I. RECORDS MANAGEMENT (GENERAL)

A. Importance of records management:
   1. Evolution of records management programs
   2. Records management in the business organization
   3. Basic needs for records management: records retention, retrieval, file deletion, and control at all phases
B. Theories and principles of paperwork simplification
C. Analysis and evaluation of records:
   1. Active
   2. Inactive
   3. Vital
   4. Confidential and secret

TOPIC II. THE PARTS OF A RECORDS MANAGEMENT PROGRAM

A. Files management:
   1. Creation and use
   2. Standardization
   3. Centralization
   4. Costs
B. Inventories of types, quantities, and locations of records
C. Retention and transfer schedules and procedures
D. Design and operation of records centers:
   1. Local
   2. Remote
   3. Archives
   4. Company libraries or collections

TOPIC III. DEVELOPING AND MAINTAINING A RECORDS MANAGEMENT PROGRAM

A. Defining the scope of the program:
   1. Needs and goals
   2. Policies and guide lines
   3. Authority and accountability
   4. Schedule for developing program phases and achieving goals; setting priorities
   5. Organization and personnel involved
   6. Need for professional consultants
B. Program promotion:
   1. Advisory committee
   2. Involvement of supervisors

   3. Departmental representation and participation
C. Negotiating program phases as they involve personnel and departments throughout the firm (the human relations problem)
D. Program evaluation and modification
E. Written procedures

TOPIC IV. RECORD SURVEYS

A. The dynamics of interviewing for gathering information
B. Taking inventory of records throughout the firm:
   1. Schedule
   2. Line participation
   3. Specialists
C. Classifying types of records
D. Implementing survey findings
E. Records retention and disposition schedules

TOPIC V. SUPPLIES AND EQUIPMENT

A. Active files:
   1. Folders and guides
   2. Filing equipment
   3. Miscellaneous (card records, labels, file compressors, dividers, follow blocks)
B. Transfer and storage equipment
C. Records copiers (wet, dry, chemical)
D. How to develop a source file of equipment sources and manufacturers
E. Motorized and electronic equipment (see Topic VII)

TOPIC VI. PROTECTION OF RECORDS

A. Against fire
B. Against dust, humidity, and general deterioration
C. Against theft
D. Against other types of disasters

TOPIC VII. AUTOMATED EQUIPMENT IN A RECORDS MANAGEMENT PROGRAM

A. Microfilming
B. Automatic information retrieval systems:
   1. Indexing problems
   2. Key word indexing concepts
C. One-system concepts:
   1. On-line stations
   2. Maximum utility with minimum manual manipulation or duplication

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Bassett, Ernest D.; Agnew, Peter L.; and Goodman, David G. *Business Filing and Records Control, 3rd ed.* Cincinnati: South-Western, 1964. Filing Office Practice Set, Final Examination, Placement Tests, and Manual.

Becker, J. and Hayes, R. M. *Introduction to Information Storage and Retrieval: Tools, Elements, Theories.* New York: John Wiley and Sons, 1963.

Blegen, August H. *Records Management.* Stamford, Conn.: Office Publications, Inc., 1965.

Freeman, D. H., Jr. *Reference Manual on a Practical Approach to Information and Data Retrieval.* Boston: Industrial Education Institute, 1963.

Griffin, M. C. *Records Management: A Modern Tool for Business.* Boston: Allyn and Bacon, 1964.

Johnson, Mina M., and Kallaus, Norman F. *Records Management.* Cincinnati: South-Western, 1966. Manual.

Kahn, Gilbert; Yenan, Theodore; and Stewart, Jeffrey. *Progressive Filing and Records Management.* New York: McGraw-Hill, 1962.

Place, Irene, and Popham, Estelle. *Filing and Records Management.* Englewood Cliffs, N.J.: Prentice-Hall, 1966.

Schellenberg, T. R. *Modern Archives: Principles and Techniques.* Chicago: University of Chicago Press, 1956.

Wylie, H. L., Editor. *Office Management Handbook, 2nd ed.* New York: Ronald Press, 1958.

BUSINESS REPORTS

Specialized Skill for Executive Secretaries Elective for Other Secretaries

Hours Class: 1 hour daily Total: 15 hours

Description and Teaching Suggestions

The purpose of this unit is to develop skill in logical thinking as well as clear writing. Trainees should be acquainted with the function and use of reports in business and government, the various kinds of reports, and current trends in report writing. The introductory topics should be covered fairly quickly since most of the time should be spent in actual practice and report evaluation. The needs of the trainees also should be taken into account when determining the time allotment. Some typical reports should be obtained from business, duplicated, and distributed so that trainees may observe the ways in which writing style and format of reports differ from letters, and also how reports differ from one another in writing style, organization, and presentation.

The unit on reports should follow a unit on correspondence, so that trainees may have adequate time for collecting materials and organizing them for written presentation. Evaluation of trainee achievement should be made by using submitted reports.

Standards of Achievement

Organize and prepare, in good form and acceptable style, simple business reports on a variety of subjects assigned.

Prerequisites for Study of Business Reports

Communications and Basic Language Skills.
Business Correspondence.

Topic Outline

I. Function of Reports in Business and Government
II. Comparison of Letters and Reports
III. Comparison of Different Types of Reports
IV. Memorandum Reports for Internal Use
V. Practice Report Writing

TOPIC I. FUNCTION OF REPORTS IN BUSINESS AND GOVERNMENT

A. Administrative need for decision
B. Historical record
C. Requests for consideration or action

TOPIC II. COMPARISON OF LETTERS AND REPORTS

A. Writing style
B. Format

TOPIC III. COMPARISON OF DIFFERENT TYPES OF REPORTS

A. Narrative
B. Statistical reports
C. Investigative
D. Progress information report
E. Report on reasons for delay in schedule
F. Financial reports
G. Contemplated action report
H. Advisory reports

TOPIC IV. MEMORANDUM REPORTS FOR INTERNAL USE

A. Purpose
B. Addressee
C. Copy holders
D. File record
E. Regular or special

TOPIC V. PRACTICE REPORT WRITING

A. Methods of collecting data:
  1. Primary sources
  2. Secondary sources
B. Evaluating and selecting data
C. Classifying and organizing information
D. Developing logical reasoning process
E. Drawing conclusions
F. Making recommendations
G. Presenting graphic material
H. Writing letter of transmittal

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

BROMAGE, MARY C. *Writing for Business.* Ann Arbor, Mich.: University of Michigan Press, 1965.

BROWN, LELAND. *Effective Business Report Writing.* Englewood Cliffs, N.J.: Prentice-Hall, 1955.

KEITHLEY, ERWIN M. *A Manual of Style for the Preparation of Papers and Reports.* Cincinnati: South-Western, 1959.

SHURTER, R. L.; WILLIAMSON, J. P.; AND BROEHL, W. *Business Research and Report Writing for Business.* New York: McGraw-Hill, 1965.

SIGBAND, NORMAN B. *Effective Report Writing.* New York: Harper and Brothers, 1960.

SKLARE, ARNOLD B. *Creative Report Writing.* New York: McGraw-Hill, 1964.

ADMINISTRATIVE OFFICE EDUCATION UNITS

Administrative office education units are studies designed primarily for those trainees assuming supervisory duties in the stenographic-secretarial occupational field. They can be offered to trainees in specialized legal, medical, scientific, or engineering fields, or to those secretaries advancing to executive secretarial posts. Additionally, those persons who will become steno-pool supervisors will also profit from Principles of Effective Supervision, Personnel Administration Practices, and Office Administration units.

Executive secretaries or executive secretarial trainees may elect Forms Design, Business Reports, Procedures Writing, and Records Management in the specialized office education units section. Any of the administrative office education units that follow may be elected by executive secretaries, depending on need.

OFFICE ADMINISTRATION

Functional Requirement for Executive Secretaries and Steno-Pool Supervisors
Elective for All Secretaries

Hours **Class: 1 hour daily** **Total: 30 hours**

Description and Teaching Suggestions

This unit is designed to assist trainees with setting up the clerical or stenographic unit in an office and to help employers with suggestions regarding layout requirements for efficiency of clerical and secretarial work. Further, the unit will assist the trainee to develop techniques for planning, organizing, and simplifying work. It will also help to develop an understanding of the need for effective training and supervision of employees. The Principles of Effective Supervision unit provides more intensive preparation for certain supervisional duties presented in this unit. Information presented under each topic should be followed by practice in working up office layouts, organization, communications, and flow charts. Evaluation of trainees should be made by objective tests on factual information and by teacher observations of work habits and interest as demonstrated in case studies, practice work simplification problems, and role playing in job instruction training.

Standards of Achievement

1. Know fundamentals of good office layout, communication and information handling, and supervision.
2. Demonstrate principles of job instruction training and work simplification in practice problems and role playing.

Prerequisites for Study of Office Administration

General Office Education Units as suggested or demonstrated proficiencies equivalent to standards of achievement for those units.

Topic Outline

I. Organization and Management of an Office
II. Office Layout
III. Job Instruction
IV. Work Simplification
V. Communication and Information Handling
VI. Elements of Supervision
VII. Interdepartmental Cooperation

TOPIC I. ORGANIZATION AND MANAGEMENT OF AN OFFICE

A. Type of work to be done
B. Management and staff:
   1. Reporting relationships

2. Role of supervisor—
    a. Responsibility
    b. Authority
    c. Planning and organization
    d. Consideration of costs

TOPIC II. OFFICE LAYOUT

A. Types and volume of work to be done
B. Equipment and furniture required
C. Storage areas:
    1. Files
    2. Supplies
D. Office facilities (light, heat, power, etc.)
E. Availability of space and individual work area
F. Work flow
G. Arrangement and location of work stations

TOPIC III. JOB INSTRUCTION

A. Defining tasks
B. Using principles of learning
C. Exercising human relations in instruction
D. Applying job instruction and teaching methods
E. Scheduling instruction
F. Evaluating instruction and learning
G. Practicing job instruction training

TOPIC IV. WORK SIMPLIFICATION

A. Finding jobs to be improved
B. Analyzing tasks and work flow
C. Flow process charting
D. Simplifying work (short cuts to efficiency)
E. Making recommendations
F. Practicing work simplification

TOPIC V. COMMUNICATION AND INFORMATION HANDLING

A. Analyzing correspondence, memoranda, and reports
B. Analyzing media
C. Establishing efficient methods of handling information

TOPIC VI. ELEMENTS OF SUPERVISION

A. Introduction to fundamentals of supervision:
    1. Planning
    2. Organizing
    3. Communicating
    4. Directing
    5. Controlling
    6. Evaluating
B. Human relations in supervision
C. Job performance standards
D. Self-improvement plans

TOPIC VII. INTERDEPARTMENTAL COOPERATION

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Heckmann, I. L., and Huneryager, S. G. *Human Relations in Management.* Cincinnati: South-Western, 1960.

Huffman, Harry; Mulkeme, Donald J. D.; and Russon, Allien. *Office Procedures and Administration.* New York: McGraw-Hill, 1965. Instructor's Manual, Key, and Study Guide.

Johnson, Mina M., and Kallaus, Norman F. *Records Management.* Cincinnati: South-Western, 1966. Manual.

Laird, Donald A., and Laird, Eleanor. *Practical Business Psychology, 3rd ed.* New York: McGraw-Hill, 1961. Tests.

Lazarro, Victor. *Systems and Procedures.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

Neuner, John J. W. *Office Management, 4th ed.* Cincinnati: South-Western, 1959. Instructor's Manual.

Neuner, John J. W., and Keeling, B. Lewis. *Administrative Office Management, 5th ed.* Cincinnati: South-Western, 1966. Manual.

Newton, Roy, and Green, Helen Hinkson. *How To Improve Your Personality, 3rd ed.* New York: McGraw-Hill, 1963.

Place, Irene, and Hicks, Charles B. *College Secretarial Procedures, 3rd ed.* New York: McGraw-Hill, 1964. Workbook, Tests, Instructor's Manual, Key, and Filmstrips and Records.

Robinson, Edwin, and Hall, J. Curtis. *College Business Organization and Management, 3rd ed.* New York: McGraw-Hill, 1964.

Russon, Allien R. *Business Behavior, 3rd ed.* Cincinnati: South-Western, 1964.

Selden, William; Straub, Lura Lynn; and Porter, Leonard J. *Filing and Finding.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

Simpson, C. W. *Office Standards and Planning Book.* Jamestown, N.Y.: Art Metal Construction Co.

Terry, George R. *Office Management and Control, 3rd ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1958.

Tonne, Herbert; Simon, Sidney; and McGill, E. C. *Business Principles, Organization, and Management, 2nd ed.* New York: McGraw-Hill, 1963.

EXECUTIVE SECRETARIAL PRACTICES

Functional Requirements for Executive Secretaries

Hours Class: 1 hour daily Total: 30 hours

Description and Teaching Suggestions

This unit is designed to develop proficiencies in fundamental office procedures and practices in greater depth than the elementary training units for stenographers and secretaries. Studied concurrently with Executive Secretarial Development and Principles of Effective Supervision, it should fulfill the technical knowledge and practices needed to carry out some executive secretary responsibilities. Secretarial techniques such as handling the mail, using the telephone properly, and using office machines are reviewed in this unit. The inclusion of these practices will be useful to trainees who continue advanced studies while remaining in school and also to those trainees who have been away from school for a period of time but wish to upgrade their skills.

Depending on the composition of the group, in terms of experience and knowledge, teachers should judge how much time to devote to the review of basic information. Under each topic, provision is made for review and for developing deeper understanding of the topic. As much emphasis as possible should be on "doing" and on practice in exercising judgment in choosing which procedure or method will be used.

Standards of Achievement

Qualitative evaluation should be made periodically by the teacher as to the trainee's judgment in typical office practice cases. Written tests to evaluate acquired knowledge should be given. Objective observation of exhibited skills should also be made.

Prerequisites for Study of Executive Secretarial Practices

General and Specialized Office Education Units as suggested. Demonstrated proficiencies equivalent to standards of achievement for those units are acceptable.

Executive Secretarial Development and Principles of Effective Supervision should be taken concurrently, if possible.

Topic Outline

I. Mailing and Shipping Services
II. Communications
III. Duplicating Methods and Techniques
IV. Using Reference Services for Office Research
V. Secretarial Responsibilities for Meetings and Conferences
VI. Banking and Financial Procedures

TOPIC I. MAILING AND SHIPPING SERVICES

A. Incoming mail:
  1. Digesting and registering mail
  2. Recognizing routine and special correspondence
  3. Making up route slips
  4. Answering correspondence
  5. Judging which letters should be duplicated

B. Outgoing mail:
  1. Using post office services for special information (zip codes, rates, packaging)
  2. Selecting appropriate mailing class for items
  3. Special postal services—
    a. Special handling
    b. Educational materials mailing
    c. Registered mail
    d. Special delivery
    e. Insurance
    f. Return receipt requested
    g. Postage meters
    h. Franking privileges
    i. Bulk mail
    j. Parcel post service
    k. Money orders
    l. International mail

C. Shipping services:
  1. Comparison of rates, speed, and handling—
    a. Rail and railway express
    b. Air and air express
    c. Truck
    d. Parcel post service
  2. International shipping—
    a. Choosing method of shipping
    b. Special documents
    c. Special clearances
  3. Packing of shipments

  4. Working with shipping department
  5. Shipping records

TOPIC II. COMMUNICATIONS

A. Review of telephone services and equipment:
  1. Setting up conference calls
  2. Telephone techniques
  3. Incoming and outgoing calls
  4. Special telephone company services useful for training
B. Telegraph communication:
  1. Composition of messages
  2. Word count
  3. Types of telegrams—
    a. Rates (full, day, night letter)
    b. Speed
    c. Cablegrams and radiograms
  4. Transmission facilities
  5. Delivery and confirmation
  6. Special uses of telegraphic communications
C. Internal communications and memoranda

TOPIC III. DUPLICATING METHODS AND TECHNIQUES

A. How to choose appropriate duplicating method:
  1. Criteria of quality, costs, and volume
  2. Speeds of duplication
  3. Longevity of copy
B. Duplication methods:
  1. Dry copiers (photocopiers)
  2. Thermal copying process
  3. Wet copiers
  4. Xerographic copiers
  5. Spirit duplicators
  6. Mimeograph
  7. Multilith process
  8. Offset process
  9. Special duplication methods—
    a. Diazo
    b. Dye transfer
    c. Other chemical copiers
C. Preparing reproducibles:
  1. Camera-ready copy techniques
  2. Direct-image masters
  3. Spirit and stencil masters
  4. Artwork and other mechanicals
  5. Galley pages and proofs
D. Checking reproducible copy:
  1. Editing and cost of author alterations
  2. Proofreading and proofreading marks
  3. Checking typeset quality
  4. Using outside reproduction services
E. Manuscript preparation:
  1. Establish criteria for publishing of manuscript
  2. Choosing covers—
    a. Cover stock and color
    b. Embossed covers
    c. Imprinted covers
  3. Choosing appropriate paper stock
  4. Using lithographic and printing services
  5. Choosing type
  6. Obtaining printing bids

TOPIC IV. USING REFERENCE SERVICES FOR OFFICE RESEARCH

A. Desk references:
  1. Dictionaries
  2. Telephone directories
  3. Almanacs
  4. Secretarial handbooks
B. Available references:
  1. Postal manual
  2. Hotel Red Book
  3. City directories
  4. Atlas
C. Sources of general information:
  1. Specialized dictionaries
  2. Encyclopedias
  3. Biographical information
  4. Books of quotations
  5. Grammar and word usage
  6. Information about local, State, and Federal governments
D. Sources of business information:
  1. Credit information
  2. Financial information
  3. Information supplied by the government
E. Using reference sources:
  1. Library facilities—
    a. Card catalog
    b. Microfilm services
  2. Help of librarian

TOPIC V. SECRETARIAL RESPONSIBILITIES FOR MEETINGS AND CONFERENCES

A. Making an agenda
B. Writing minutes
C. Preparing for formal meetings:
  1. Advance preparation
  2. Reporting
  3. Writing resolutions
  4. Followup
D. Preparing for informal meetings
E. Preparing for corporate meetings
F. Knowing parliamentary procedure

TOPIC VI. BANKING AND FINANCIAL PROCEDURES

- A. Banking procedures:
    - 1. Making deposits
    - 2. Endorsing checks
    - 3. Keeping a check book—
        - a. Writing checks
        - b. Guarding against mistakes
    - 4. Reconciling bank statements
- B. Financial records:
    - 1. Income statement
    - 2. Balance sheet
    - 3. Budgets
    - 4. Insurance records
    - 5. Investment records
    - 6. Property records
    - 7. Payroll records
    - 8. Petty cash records
    - 9. Expense accounts

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

Agnew, Peter L.; Meehan, James R.; and Oliverio, Mary Ellen. *Secretarial Office Practice, 7th ed.* Cincinnati: South-Western, 1966. Workbook, Achievement Tests, and Manual.

Beamer, Esther K.; Hanna J. Marshall; and Popham, Estelle L. *Effective Secretarial Practices, 2nd ed.* Cincinnati: South-Western, 1962.

Carson, Dr. A. B.; Sherwood, J. F.; and Boling, C. *Secretarial Accounting, 7th ed.* Cincinnati: South-Western, 1962.

Doris, Lillian, and Miller, Besse M. *Complete Secretary's Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Engel. *Executive Secretary's Handbook.* Englewood Cliffs, N.J.: Prentice-Hall, 1965.

Place, Irene, and Hicks, Charles B. *College Secretarial Procedures, 3rd ed.* New York: McGraw-Hill, 1964.

Russon, Allien R. *Business Behavior.* Cincinnati: South-Western, 1965.

Sferra, Adam; Wright, Mary; and Rice, Louis A. *Personality and Human Relations in Business, 2nd ed.* New York: McGraw-Hill, 1961.

Whitcomb, Helen, and Lang, Rosalind. *Charm: The Career Girl's Guide to Business and Personal Success.* New York: McGraw-Hill, 1964.

Whitcomb, H., and Whitcomb, J. *Strictly for Secretaries.* New York: McGraw-Hill, 1965.

EXECUTIVE SECRETARIAL DEVELOPMENT

Administrative Requirements for Executive Secretaries

Hours Class: 1 hour daily Total: 30 hours

Description and Teaching Suggestions

This unit, which goes beyond stenographic skills and clerical procedures, is designed to prepare the top rank of those interested in secretarial work to function as secretarial assistants (executive aides) to major executives. It informs the trainee about principles of human relations, communications, and public relations. It teaches him to recognize the elements of management and organization of his work as well as how to recognize these functions within the firm. It enables him to gain insight into the scope of the work of a competent executive aide. The use of good judgment is stressed through the use of case studies, in-basket, and on-the-job type exercises in which the trainee has to identify alternate courses of action and decide which action to take. Such in-basket situations consist of collections of letters, memoranda, and problems that are to be handled on a given day and challenge the trainee to think realistically.

At the same time, the unit provides the trainee with opportunities for some drill in the stenographic skills, spelling, grammar, office techniques, and almost all other subjects taught in other business-oriented classes. Stress, however, is placed on judgment factors, personal relations, and the types of duties that a dependable, knowledgeable executive aide might have to perform for a major executive. Because of its relationship to the Executive Secretarial Practices and Principles of Effective Supervision units, the teacher should coordinate his activities in this unit with teachers of the aforementioned units for overall effectiveness. The orientation for this unit should be to develop the career or professional approach to the job by the trainee.

Standards of Achievement

Demonstrated skill in the functions required of the executive secretary as observed by the teacher.

Written tests of knowledge to evaluate the trainee.

Prerequisites for Study of Executive Secretarial Development

General and Specialized Office Education Units as suggested. Demonstrated proficiencies equivalent to standards of achievement for suggested units are acceptable.

Principles of Effective Supervision and Executive Secretarial Practices should be studied concurrently, if possible.

Several years experience as a secretary would be helpful.

Topic Outline

I. The Role of the Executive Aide
II. Personality and Human Relations
III. Managing Communications
IV. Managing Correspondence
V. Reference Tools
VI. Managing Records
VII. Travel Arrangements and Services
VIII. Review of Meeting and Conference Work
IX. Teamwork Within the Organization
X. Departmental Supervision

TOPIC I. THE ROLE OF THE EXECUTIVE AIDE

A. The secretarial image:
    1. The old stereotype
    2. The new executive aide concept
B. The place of an executive aide in the upper echelons of the administrative world
C. Career choices:
    1. In government
    2. Industry
    3. The professions
    4. Trade associations
    5. Communications
D. Educational qualifications
E. Professional organizations

TOPIC II. PERSONALITY AND HUMAN RELATIONS

A. Elements of human relations:
    1. Basic human needs
    2. Principles of human behavior
    3. Self-esteem and reinforcement
B. An executive aide's role in human relations
C. An executive aide's personality:
    1. Desirable characteristics
    2. Personality traits
    3. Attitude
D. Appearance and grooming:
    1. Taste and style
    2. Voice, poise, and maturity
E. A plan for self-improvement and maximum performance
F. Human relations cases

TOPIC III. MANAGING COMMUNICATIONS

A. The role of the executive aide in public relations and the responsibilities for managing communications
B. Communicating by telephone
C. Communicating by telegraph
D. Communicating by letter (ingredients of successful letters; letters the executive aide may write)
E. Communicating by report:
    1. Report forms
    2. Ingredients of successful reports
    3. Special-feature reports
F. Communicating with business callers
G. Communicating with the boss and co-workers
H. Keeping confidential matters top secret

TOPIC IV. MANAGING CORRESPONDENCE

A. Review of handling incoming mail:
    1. Related information
    2. Dictation procedures
B. Review of routing and circulating mail:
    1. Transfer forms
    2. Routing sheets
    3. Copy machines
C. When the boss is away:
    1. Handling urgent matters
    2. Writing acknowledgments
    3. Preparing digests
D. Review of preparing outgoing mail (transcription procedures and letter forms)
E. Review of dispatching the mail (postal services, mail-handling equipment, shipping services, and insurance)
F. Direct mail:
    1. Direct-mail objectives
    2. Mailing lists

TOPIC V. REFERENCE TOOLS

A. The executive aide as an assistant in searching out data for reports and speeches
B. Brief review of types of reference books
C. Sources of information:
    1. General
    2. Business
    3. Libraries
D. Taking notes and listing sources
E. Review of manuscript preparation for publication

TOPIC VI. MANAGING RECORDS

A. The significance of office records and the responsibilities of an executive aide in maintaining them
B. Filing equipment, supplies, and systems
C. Filing and finding procedures; followup procedures
D. Retention and disposition schedules; transfer systems
E. Review of:
    1. Bank accounts
    2. Petty cash
    3. Insurance records
    4. Investment (stock, rent, property) records
    5. Statistical records
F. Legal records:
    1. Leases
    2. Contracts
    3. Mortgages
    4. Miscellaneous

TOPIC VII. TRAVEL ARRANGEMENTS AND SERVICES

A. The executive aide's responsibility in planning a trip for the executive
B. Preparing itineraries and travel papers:
    1. Domestic travel
    2. Overseas travel
C. Travel arrangements:
    1. Hotel reservations (domestic and overseas)
    2. Funds and credit cards
    3. Baggage and other materials
D. While the boss is away:
    1. Forwarding mail
    2. Handling appointment requests
    3. Handling daily matters
    4. Catching up
E. Expense reports and followup of transactions while away

TOPIC VIII. REVIEW OF MEETING AND CONFERENCE WORK

A. Types of meetings and conferences and their purpose
B. The executive aide's responsibility in preparing for and maintaining records of meetings and conferences
C. Arranging for meetings and conferences and agenda
D. Recording the proceedings
E. Preparing the proceedings, minutes, and other publications

TOPIC IX. TEAMWORK WITHIN THE ORGANIZATION

A. Understanding the organization:
    1. Partnerships
    2. Corporations
    3. Foundations
B. Types of organizations:
    1. Functional
    2. Line and staff; operational and advisory
    3. Committees
    4. Organization charts
C. Levels of management and problems of coordination and communication
D. Understanding function and location within the organization:
    1. Scope of authority; accountability
    2. Job descriptions
    3. The grapevine and the chain of command
    4. Centralized services and how to use them

TOPIC X. DEPARTMENTAL SUPERVISION

NOTE: Coordinate with Principles of Effective Supervision.

A. Promotion through supervision
B. Qualities of supervision
C. The worker's needs vs. production demands
D. Training and motivation; how to give directions and orders

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

4th ed. Cincinnati: South-Western, 1958. Workbook, Alter-

AURNER, DR. ROBERT R. *Effective Communication in Business,* nate Problems, Pretests, Examination, and Manual.

BEAMER, ESTHER K.; HANNA, J. MARSHALL; AND POPHAM, ESTELLE L. *Effective Secretarial Practices, 4th ed.* Cincinnati: South-Western, 1962. Workbook and Manual.

CASSARA, BEVERLEY B., EDITOR. *American Women: The Changing Image.* Boston: Beacon Press, 1962.

CUSSLER, MARGARET. *The Woman Executive.* New York: Harcourt, Brace, and Co., 1958.

DAVIS, K. *Human Relations at Work.* New York: McGraw-Hill, 1962.

DORIS, LILLIAN, AND MILLER, BESSE M. *Complete Secretary's Handbook, 7th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

ELLMAN, EDGAR S. *Managing Women in Business.* Chicago: Ellman Associates, 1963.

HECKMANN, I. L., AND HUNERYAGER, S. G. *Human Relations in Management.* Cincinnati: South-Western, 1960.

HUFFMAN, HARRY; MULKERNE, DONALD; AND RUSSON, ALLIEN. *Office Procedures and Administration—College Course.* New York: McGraw-Hill, 1965.

JOHNSON, MINA M., AND KALLAU, NORMAN F. *Records Management.* Cincinnati: South-Western, 1966. Manual.

LEE, DOROTHY; DICKINSON, TILLY; AND BROWER, WALTER. *Secretarial Practice for Colleges, 2nd ed.* New York: McGraw-Hill, 1965.

MAULE, FRANCES. *Executive Careers for Women.* New York: Harper and Brothers, 1961.

MILLER, DONALD B. "The Secretary in a Changing World," *The Secretary,* June, 1963.

NATIONAL MANPOWER COUNCIL. *Womanpower.* New York: Columbia University Press, 1957.

NEUNER, JOHN J. W., AND KEELING, B. LEWIS. *Administrative Office Management, 5th ed.* Cincinnati: South-Western, 1966. Manual.

PLACE, I., AND HICKS, CHARLES. *College Secretarial Procedures, 3rd ed.* New York: McGraw-Hill, 1964.

RUSSON, ALLIEN R. *Business Behavior, 3rd ed.* Cincinnati: South-Western, 1964.

SFERRA, ADAM; WRIGHT, MARY; AND RICE, LOUIS A. *Personality and Human Relations in Business, 2nd ed.* New York: McGraw-Hill, 1961.

STRONY, MADELINE; SMITH, MARY; AND GARVEY, CLAUDIA. *The Secretary at Work, 3rd ed.* New York: McGraw-Hill, 1966.

U.S. DEPARTMENT OF LABOR. *Fifteen Years After College.* Washington: Superintendent of Documents, U.S. Government Printing Office, 1962.

PRINCIPLES OF EFFECTIVE SUPERVISION

Administrative Requirement for Secretaries, Senior Stenographers, and Steno-Pool Supervisors

Hours Class: 2 hours daily **Total: 60 hours**

Description and Teaching Suggestions

The major objectives of this unit are to develop supervisory skills and knowledges. The unit introduces the trainee to the principles of effective supervision and the application of these principles to actual situations. Specifics concerning morale, behavior, personality, and office supervision can be covered in case studies and in role playing. The trainee, therefore, has the dual responsibility of learning and application. The emphasis during the first part of each topic is *learning;* the emphasis during the second part is *application.* The unit is outlined so as to afford the teacher the opportunity to use various teaching methods. The nature of the content of this unit requires that qualitative standards be applied. Teachers must judge the trainee's ability to employ the imparted knowledge under stimulated practice conditions. A few pass-fail written tests may be used to check acquired knowledge.

Standards of Achievement

Demonstrate effectively the application of principles of supervision under simulated practice conditions.

Prerequisites for Study of Principles of Effective Supervision

General and Specialized Office Education Units as suggested or demonstrated proficiencies equivalent to the standards of achievement for these units.

Topic Outline

I. The Function of Supervision
II. The Supervisory Job: General Responsibilities
III. Communicating with Employees
IV. Organizing Work
V. Evaluating Employees
VI. Interviewing and Counseling
VII. Awareness of Emotional Problems
VIII. How To Build Employee Morale
IX. Factors Affecting Supervision

TOPIC I. THE FUNCTION OF SUPERVISION

A. Major responsibilities:
  1. Planning
  2. Organizing
  3. Directing
  4. Controlling and evaluating
B. Nature of office supervision
C. Supervisory authority and responsibility:
  1. Limitations on authority—
    a. Decisions without approval
    b. Decisions after advice and counsel
    c. Decisions with superior's approval
    d. Decisions referred to superior
  2. Limitations on responsibility
D. Accountability for actions
E. Relationships with superiors
F. The element of risk in supervisory decision-making

TOPIC II. THE SUPERVISORY JOB: GENERAL RESPONSIBILITIES

A. Participating in the selection and placement of office employees:

1. Cooperating with the personnel department (See Personnel Administration Practices unit)
2. Interviewing prospective employees
3. Evaluating abilities and attitudes of prospective employees
4. Selecting employees

B. Indoctrinating and training employees:
1. How to orient new employees
2. How to determine training needs
3. How to train employees—
a. Principles of learning
b. Methodology

C. Organizing the work of the section
D. Obtaining quality work from others
E. Developing employees' abilities and interests effectively
F. Reviewing and evaluating work performance
G. Using good human relations to develop teamwork
H. Improving work methods
I. Developing interdepartmental cooperation
J. Keeping personnel records:
1. Pertinent personal data
2 Dates of employment training
3. Attendance and vacation schedules
4. Salaries

K. Solving Problems

TOPIC III. COMMUNICATING WITH EMPLOYEES

A. Communicating changes in work methods:
1. Encouraging participation in changes
2. Notifying employees of changes contemplated by superiors or company

B. Communicating changes in policies and procedures
C. Communicating orders (direction)
D. Communicating job performance standards

TOPIC IV. ORGANIZING WORK

A. How to organize physical equipment
B. How to establish operating procedures
C. How to encourage employee participation in work organization
D. How to plan for improvement

TOPIC V. EVALUATING EMPLOYEES

A. Using reasonable criteria for evaluation:
1. Behavior
2. Attendance and punctuality
3. Quality of work
4. Grooming

B. Notifying employees about criteria to be used
C. Recording actions for evaluation purposes
D. Noting actions requiring discipline
E. Giving appropriate rewards

TOPIC VI. INTERVIEWING AND COUNSELING

A. How to interview:
1. Listening skills required
2. Directive vs. non-directive approaches—appropriateness of each method
3. Gaining agreement

B. How to counsel employees

TOPIC VII. AWARENESS OF EMOTIONAL PROBLEMS

A. Understanding employee needs
B. Understanding anxiety
C. Understanding defensive behavior
D. Recognizing need for professional counseling assistance for employees

TOPIC VIII. HOW TO BUILD EMPLOYEE MORALE

TOPIC IX. FACTORS AFFECTING SUPERVISION

A. Union agreements
B. Government requirements
C. Company policies
D. Maintenance of professional or ethical standards
E. Availability of skills
F. Personal forces at work within supervisors:
1. Value system
2. Need for security
3. Democratic vs. autocratic approach to leadership

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

ARGYRIS, CHRIS. *Personality and Organization.* New York: Harper and Row, 1957.

BURSK, EDWARD C. *Human Relations for Management.* New York: Harper and Brothers, 1956.

CHRUDEN, HERBERT J., AND SHERMAN, ARTHUR W. *Personnel Management, 2nd ed.* Cincinnati: South-Western, 1963.

CUSHMAN, FRANK, AND CUSHMAN, ROBERT W. *Improving Supervision.* New York: John Wiley and Sons, 1947.

DAVIS, KEITH. *Human Relations at Work, 2nd ed.* New York: McGraw-Hill, 1962.

———. *Readings in Human Relations, 2nd ed.* New York: McGraw-Hill, 1964.

DUBIN, ROBERT. *Human Relations in Administration.* Englewood Cliffs, N.J.: Prentice-Hall, 1961.

FAMULARO, J. *Supervisors in Action: Developing Your Skills in Managing People.* New York: McGraw-Hill, 1961.

FAMULARO, JOSEPH, AND ATKINSON, P. *Executive Development.* New York: McGraw-Hill (in press).

GARDNER, BURLEIGH B., AND MOORE, DAVID G. *Human Rela-*

tions in Industry. Homewood, Ill.: Richard D. Irwin, Inc., 1950.

HEPNER, HARRY WALKER. *How To Live and Work Successfully with People in Business*. Englewood Cliffs, N. J.: Prentice-Hall, 1952.

HUFFMAN, HARRY; MULKERNE, DONALD J. D.; AND RUSSON, ALLIEN. *Office Procedures and Administration*. New York: McGraw-Hill, 1965.

LAIRD, DONALD, AND LAIRD, ELEANOR. *Practical Business Psychology, 3rd ed.* New York: McGraw-Hill, 1961.

NELSON, ROGER H. *Human Relations and Office Management*. Salt Lake City: University of Utah, 1964.

NEUNER, JOHN J. W., AND KEELING, B. LEWIS. *Administrative Office Management, 5th ed.* Cincinnati: South-Western, 1966. Manual.

RUSSON, ALLIEN R. *Business Behavior*. Cincinnati: South-Western, 1965.

SFERRA, ADAM; WRIGHT, MARY ELIZABETH; AND RICE, LOUIS A. *Personality and Human Relations in Business, 2nd ed.* New York: McGraw-Hill, 1961.

WHITCOMB, HELEN, AND LANG, ROSALIND. *Charm: The Career Girl's Guide to Business and Personal Success*. New York: McGraw-Hill, 1964.

PERSONNEL ADMINISTRATION PRACTICES

Functional Requirement for Steno-Pool Supervisors and Executive Secretaries

Hours **Class: 2 hours daily** **Total: 60 hours**

Description and Teaching Suggestions

This administrative training unit is designed to offer the trainee a realistic study of the principles and practices of personnel administration. The unit provides knowledge needed by every secretary that acts in the capacity of administrative assistant, office supervisor, or administrative manager. The trainee studies principles, and then utilizes his knowledge through practical application to case studies, panel discussions, debates, role playing, and actual business personnel problems. A suggested effective plan for presenting this unit is to allow approximately nine hours to each topic, five of which are used for the study of principles, current practices, and potential problems. The four hours remaining on each topic should be used for problem solving through case discussion and role playing as well as for administering and taking employment tests. Pencil-and-paper tests should be used to assess acquisition of knowledge of each topic. Qualitative evaluations should be made by the teacher of the trainees' application of principles to the various problems and exercise of judgment. Teachers should avoid a purely academic approach to this subject.

Standards of Achievement

Demonstrate knowledge of personnel practices such as recruitment, selection, placement, wage and salary administration, job evaluation, labor laws, and supervision.

Prerequisites for Study of Personnel Administration Practices

General Office Education Units as suggested or demonstrated proficiencies equivalent to achievement standards for those units.

Principles of Effective Supervision and Executive Secretarial Development may be studied concurrently.

Topic Outline

I. Function and Importance of Personnel Administration
II. Recruitment and Placement
III. Improving Job Effectiveness
IV. Supervision
V. Personnel Administration and Unions
VI. Remuneration
VII. Job Evaluation

TOPIC I. FUNCTION AND IMPORTANCE OF PERSONNEL ADMINISTRATION

A. Importance to management
B. Importance to labor
C. Functions:
    1. Personnel selection
    2. Job evaluation
    3. Remuneration
    4. Policies, rules, and regulations
    5. Personnel records
    6. Personnel turnover
    7. Personnel attitudes
    8. Personnel counseling
    9. Suggestion systems

10. Personnel safety
11. Employee benefits
12. Employee unionism

TOPIC II. RECRUITMENT AND PLACEMENT

- A. Staffing the organization:
  1. Foreseeing personnel requirements
  2. Locating qualified personnel
  3. Recruiting qualified personnel
  4. Selecting personnel
  5. Testing programs
- B. Placement in the organization:
  1. Policies and procedures
  2. Placement changes
  3. Seniority considerations

TOPIC III. IMPROVING JOB EFFECTIVENESS

- A. Orientation and training:
  1. Orientation programs
  2. Training programs
- B. Evaluation of performance:
  1. Principles of evaluation
  2. Establishment of an evaluation program
  3. Methods of evaluation
  4. Performance evaluation data
- C. Motivation:
  1. Traditional views
  2. Modern views
  3. Human needs
  4. Satisfying human needs
  5. Organizational goals
- D. Communication:
  1. Process of communication
  2. Organizational structure
  3. Media of communication
  4. Communication barriers
  5. Development and maintenance of effective communication

TOPIC IV. SUPERVISION

- A. Leadership
- B. Supervisor's role in personnel administration
- C. Effective supervision
- D. Employee adjustment and morale
- E. Discipline

TOPIC V. PERSONNEL ADMINISTRATION AND UNIONS

- A. Union functions:
  1. Union impact
  2. Union appeal
- B. Growth of unions:
  1. Employee reactions
  2. Changing attitudes toward unions
  3. National affiliations
  4. Government policy
- C. Union organization and leadership:
  1. National unions
  2. Local unions
  3. Union officers
  4. Union membership
- D. Union-management relations:
  1. Bargaining relationships
  2. Security and recognition
  3. Negotiations
  4. Government regulation

TOPIC VI. REMUNERATION

- A. Sound wage structures:
  1. Importance to employees
  2. Importance to company
  3. Importance to society
- B. Wage determination:
  1. Collective bargaining
  2. Ability-to-pay principle
  3. Labor markets
  4. Relative worth of jobs (see Topic VII)
  5. Cost of living
  6. Legislation
- C. Federal wage legislation:
  1. Fair Labor Standards Act
  2. Walsh-Healy Act
  3. Davis-Bacon Act
- D. Financial incentives:
  1. Operative personnel
  2. Sales personnel
  3. Executives
  4. Participation plans

TOPIC VII. JOB EVALUATION

- A. Benefits of programs
- B. Systems of evaluation
- C. Wage structures
- D. Reclassification

Texts and Other Teaching Materials

From the following suggested texts and materials (or other equivalent commercially available material), select trainee and teacher materials for use in this unit. Additional materials are listed in Appendix D.

ARGYRIS, CHRIS. *Integrating the Individual and the Organization.* New York: John Wiley and Sons, 1964.

———. *Personality and Organization.* New York: Harper and Row, 1957.

BROOM, H. N., AND LONGENECKER. *Small Business Management.* Cincinnati: South-Western, 1961.

CALHOON, RICHARD. *Managing Personnel.* New York: Harper and Row, 1963.

CHRUDEN, HERBERT J., AND SHERMAN, ARTHUR W., JR. *Personnel Management, 2nd ed.* Cincinnati: South-Western, 1963.

———. *Readings in Personnel Management, 5th ed.* Cincinnati: South-Western, 1961.

DAVIS, KEITH. *Readings in Human Relations, 2nd ed.* New York: McGraw-Hill, 1964.

HECKMANN, I. L., AND HUNERYAGER, S. G. *Human Relations in Management.* Cincinnati: South-Western, 1960.

HENEMAN, HERBERT G., JR., AND YODER, DALE. *Labor Economics, 2nd ed.* Cincinnati: South-Western, 1965. Examinations and Manual.

HICKS, CHARLES B., AND PLACE, IRENE. *Office Management, 2nd ed.* Boston: Allyn and Bacon, 1962.

HUFFMAN, HARRY; MULKERNE, DONALD J. D.; AND RUSSON, ALLIEN. *Office Procedures and Administration.* New York: McGraw-Hill, 1965.

LANGSNER, ADOLPH, AND ZOLLITSCH, HERBERT G. *Wage and Salary Administration.* Cincinnati: South-Western, 1961, Manual.

LINDBERG, BEN A. *Cases in Personnel Administration.* Englewood Cliffs, N.J.: Prentice-Hall, 1954

LITTLEFIELD, C. L., AND RACHEL, FRANK. *Office Administrative Management, 2nd ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1964.

NEUNER, JOHN J. W., AND KEELING, B. LEWIS. *Administrative Office Management, 5th ed.* Cincinnati: South-Western, 1966. Manual.

PIGORS, PAUL JOHN WILLIAM. *Management of Human Resources: Readings in Personnel Administration.* New York: McGraw-Hill, 1964.

PIGORS, P., AND MYERS, C. A. *Personnel Administration: A Point of View and a Method, 5th ed.* New York: McGraw-Hill, 1965.

ROBINSON, EDWIN, AND HALL, J. CURTIS. *College Business Organization and Management, 3rd ed.* New York: McGraw-Hill, 1964.

TERRY, GEORGE R. *Office Management and Control, 4th ed.* Homewood, Ill.: Richard D. Irwin, Inc., 1962.

RELEVANT WORK EXPERIENCE

The final training of most workers takes place on the job. Regardless of experience, training, or education, the peculiarities of the individual work assignment, the equipment available, the particular employer, and environmental conditions will affect the final training. This training takes place, either by being presented in an organized fashion or by being "picked up" by the individual through observation, experience, or trial and error. Experience has shown that *good* on-the-job training is usually a supervised activity for which there is no practical substitute. The Vocational Education Act of 1963 has provided for on-the-job experience to be given, wherever practicable, in conjunction with the vocational education program.

COMMUNITY ADVISORY COMMITTEE

One method to help provide on-the-job work experience for most trainees is to establish a community advisory committee made up of employers, school counselors and administrators, local employment office officials, and coordinating teachers. The committee should function both in an advisory capacity and as an active instrument in providing work experience opportunities to qualified trainees.

The U.S. Office of Education's booklet, *Organization and Effective Use of Advisory Committees (OE–84009),* suggests ways to improve current vocational education programs and to help establish the advisory committee. If local employers do not hire trainees as temporary employees, some of the value of the educational program may be lost.

WORK EXPERIENCE REQUIREMENTS

Several sections of Part 104—Administration of Vocational Education: Federal Allotments to States, Rules and Regulations, Vocational Education Act of 1963, deal with the various types of work experience and programs that should be made available to eligible trainees. Excerpts from these pertinent sections are repeated below.

> Section 104.13 (h) (5). The program of instruction will combine and coordinate related instruction with field, shop, laboratory, cooperative work, or other occupational experience which (i) is appropriate to the vocational objective of the students, and (ii) is of sufficient duration to develop competencies necessary to fit him for employment in the occupation or occupational field for which he is being trained, and (iii) is supervised, directed, or coordinated by a person qualified under the State plan. See special requirements for classes providing cooperative work experience in § 104.16.
>
> Section 104.16—Cooperative programs. In providing cooperative work experience pursuant to § 104.13 (h) (5), the State plan shall provide for cooperative programs for persons enrolled in a school who, through a cooperative arrangement between the school and employers, receive part-time vocational instruction in the school and on-the-job training through part-time employment. When vocational instruction is provided in such programs meeting the standards and requirements § 104.13, the State plan shall provide that such classes be organized through cooperative arrangements (preferably in writing) between the schools providing vocational instruction to student learners in the class and the employers providing on-the-job training through part-time employment of such student-learners. Such arrangements shall provide for (a) the employment of student-learners in conformity with Federal, State, and local laws and regulations and in a manner not resulting in exploitation of such student-learner for private gain, (b) an orga-

nized program of training on the job, and (c) supplemental vocational instruction in school.

Section 104.17—Business and office education. Pursuant to the general State plan requirements of vocational instruction in § 104.13, the State plan shall require that instruction in business and office occupations be provided through courses and curricula which include both the subject matter and practical experience needed in the occupations for which instruction is provided.

Section 104.25—Requirements of work-study program. The State plan shall provide that a work-study program meet the following requirements:

> (a) Administration. The work-study program will be administered by the local educational agency and made reasonably available (to the extent of available funds) to all qualified youths, in the area served by such agency, who are able to meet the requirements in paragraph (b) of this section.
>
> (b) Eligible students. Employment under the work-study program will be furnished only to a student who (1) has been accepted for enrollment or, if he is already enrolled, is in good standing and in full-time attendance as a full-time student in a program which meets the standards prescribed by the State board and the local educational agency for vocational education programs under the 1963 Act; (2) is in need of the earnings from such employment to commence or continue his vocational education program; and (3) is at least fifteen years of age and less than twenty-one years of age at the date of the commencement of employment and is capable in the opinion of the appropriate school authorities of maintaining good standing in his school program while employed under the work-study program.
>
> (c) Limitation on hours and compensation. No student will be employed more than fifteen hours in any week during which classes in which he is enrolled are in session, or for compensation which exceeds $45 per month or $350 per academic year or its equivalent, unless the student is attending a school which is not within reasonable commuting distance from his house, in which case his compensation may not exceed $60 per month or $500 per academic year or its equivalent.
>
> (d) Place of employment. Employment under work-study programs will be for the local educational agency or for some other public agency or institution (Federal, State, or local) pursuant to a written arrangement between the local educational agency and such other agency or institution, and work so performed will be adequately supervised and coordinated and will not supplant present employees of such agency or institution who ordinarily perform such work. In those instances where employment under work-study programs is for a Federal agency or institution, the written arrangement between the local educational agency and the Federal agency or institution will state that students so employed are not Federal employees for any purpose.

The relevant work experience projects suggested in the *Curricula Synopses* section of this guide should conform to the requirements of the above sections.

Work experience may be simulated or contrived, either on-the-job or with youth groups. To make these experiences meaningful requires coordination between teachers, school administrators, counselors, community advisory committees, youth groups, and employers or others to whom the trainee may be assigned for supervised work activity. This cooperation should result in the proper choice of work activities to complement the training and meet the trainee's career objective. Other results should be a fair evaluation of the trainee's interest, industry, and performance and adequate personal guidance.

The suggested work experience programs that follow may be modified to suit local conditions and school facilities. These projects are grouped by type of work experience program, locations for work experience, and types of trainees to whom projects are applicable.

It should be remembered that the length of work experience will vary according to the variety of duties to which the trainee will be exposed and how long it will take to develop trainee self-confidence for entry into a regular position. The *Curricula Synopses* section indicates time when work experience projects may begin. However, the *length of time* indicated is minimal. Increasing this time should be arranged between local teachers, counselors, school administrators, and employers. As previously stated, a constant focus of attention should be on developing the trainee to meet employability standards in the occupational field.

USE OF JOB DESCRIPTIONS

The school's counselor and work experience coordinating teacher should be thoroughly familiar with the job descriptions and prerequisites for each job so that the arranged work experience activities may include most of what the average employer will expect from the worker. The main duties of jobs have been abstracted and are shown as typical work activities later in this section. In addition, the job prerequisites should be discussed by the trainee's coordinating teacher and the employer or person to whom the trainee is assigned so that appropriate evaluations may be made of progress and abilities. Where necessary, provision should be made for remedial instruction to help the trainee reach employable skill levels.

CONFERENCES

Throughout the relevant work experience period, regular trainee-teacher and trainee-counselor conference periods should be scheduled. Frequent and regular conferences should also be held by the teacher or counselor with the employer or person to whom the trainee is assigned. At minimum, conferences should be held before the start of the work period, at the half-way point, and toward the end of the work period. These conferences may be for evaluation, guidance, or to assist the trainee with final placement.

SCHEDULING WORK EXPERIENCE

Since there may be more trainees than can be conveniently assigned to persons within a given organization, teachers and counselors should consider all of the following possible areas for work experience assignments:

1. Teachers' or professors' offices
2. Department chairmen's offices
3. Community, civic, and trade associations
4. Foreign-language department of school
5. Import-export offices
6. Law offices and court reporters
7. Hospital medical record library
8. General business or industrial companies
9. Local physician's office (assigned to secretary)
10. Classroom (simulate office set-up)
11. School printing plant or local print shop
12. Local police department
13. School principal or administrator's office (assigned to secretary)
14. Science or research department
15. Federal, State, or local institutions

The persons and places chosen should, of course, be appropriate to the trainee's office education program and meet the requirements of State plans and the Rules and Regulations for the Vocational Education Act of 1963.

COORDINATING TEACHER'S EVALUATION OF WORK EXPERIENCE

The coordinating teacher should be constantly aware of the types of work experience being given to trainees. Often, well-intentioned employers (or their managers) will not have the time to participate actively or personally in a trainee's development. As a result, the trainee may be assigned to a supervisor who may or may not appreciate that the trainee should be given a variety of experiences rather than only a routine production task that affords little opportunity to use the trainee's developed skills. The tendency of the supervisor to be production-oriented rather than teaching-oriented should be anticipated. If this condition occurs, it is possible that a trainee's development may be hindered.

Coordinating teachers should not only be concerned with the evaluation of the trainee while on the job, but also with the evaluation of the work experience being offered. The coordinating teacher should request permission from the employer to discuss out-of-line trainee experience situations with supervisors or other workers in the organization to whom the trainee has been assigned. Appropriate measures should be discussed with the employer so that the trainee may be afforded the opportunities to demonstrate acquired skills and knowledges.

For certain jobs in the occupational field, such as steno-pool supervisor, social secretary, court reporter, or executive secretary, work experience may pose a considerable problem. Ordinarily, employers will not be inclined to give a trainee supervisory training at the expense of workers in the organization. These trainees, however, should be afforded the opportunity to work closely with supervisory personnel as "assistants to." Their role as vocational education program "trainees" should be explained clearly to other workers in the organization so that friction does not develop. The coordinating teacher should ascertain the types of tasks being performed by those trainees in "assistant to" positions.

Problems similar to those for the steno-pool supervisor, court reporter, social secretary, and executive secretary trainees may also obtain for other secretarial trainees. It is necessary that the work climate and the possibility of hostility by other workers in the organization be considered when coordinating teachers evaluate the trainee's work experience.

COOPERATIVE RELEVANT WORK EXPERIENCE PROGRAMS

Trainees about to complete the basic stenographic-secretarial program should have their schedules adjusted to provide for the on-the-job relevant work experience in addition to their in-school relevant work experience projects. For example, in the 34th program week, a stenographer-print shop trainee may study a unit on printing fundamentals and Advanced Typing and Production Problems in school and simultaneously learn printing practices while performing supervised work in a local print shop. The stenographer (1,A, GS–3) trainee's work experience can be arranged in a similar way with a local business office. The exiting police stenographer trainee may select a program consisting of Advanced Typing and Production Problems and Speed Dictation and Transcription or Stenographic Machine Operation II during the period of on-the-job training.

WORK-STUDY PROGAMS

Trainees eligible under the work-study program (Section 104.25 (c)) are limited as to the amount of time available for relevant work experience *during* their training. Flexible scheduling is required to meet the needs of these trainees. As previously suggested for programs that need to be altered to include State-required subjects of study, the intensive type of program may be adjusted by extension of time. It is suggested, however, that skill development studies be given priority in school training. Trainees in work-study programs should have on-the-job work experiences and projects comparable to those available under the cooperative program or the simulated experience program.

SIMULATED EXPERIENCE PROJECTS

When actual work experience may not be available, simulated work experience projects conducted in the school may serve as a substitute. Scheduling of unit studies should be flexible. Consideration must be given to availability of facilities, availability of instructors, and the length of each training program. The following are some suggested projects that can serve experience development purposes.

Jobs—Stenographers A and B

1. Trainee should be assigned to a teacher's office.
2. Secure 10 file copies of letters and have trainee write in shorthand and transcribe shorthand notes in planned times.
3. Take dictation from teacher or person to whom assigned.
4. Transcribe and bring carbon copies to co-

ordinating teacher for approval. Correct if necessary, retype, and submit.

5. Prepare typical budgets, type in tabular form, and submit for approval.
6. Proofread, edit, and retype series of letters or reports containing errors (vocabulary, spelling, grammar, punctuation, fact, redundancy) and submit to instructor.
7. Prepare spirit and stencil masters.
8. Prepare final copy from corrected drafts and manuscript written in longhand.
9. Transcribe letters with zip codes and other information requiring reference work.
10. Prepare mailable transcripts. Practice posting mail using scales and postage charges.
11. Trainees should self-rate themselves. Class instructor should evaluate students periodically. Weekly pay scales on basis of production of mailable transcripts and other materials should be established for trainee.

Job—Stenographer-Print Shop

NOTE: Special typewriters should be available nearby for trainee practice.

1. Take dictation and produce mailable transcripts.
2. Straight type to finished copy from corrected drafts and longhand manuscript.
3. Prepare course announcements in which class is enrolled.
4. Help set up class newspaper.
5. Prepare and duplicate job résumés for other trainees in basic or specialized programs.
6. Prepare masters and duplicate teaching materials.
7. Copy and duplicate legal and insurance forms.

Similarly, other simulated programs can be developed for the balance of stenographic and secretarial positions. Wherever possible, outside aid of professionals should be enlisted to help with office-style dictation for legal, medical, engineering, scientific, and foreign-language stenographic and secretarial trainees.

TYPICAL WORK EXPERIENCES SOUGHT

Depending on the specialization of stenographic or secretarial trainees, work experiences should include most, but not necessarily all, of the following activities:

1. Taking general or specialized terminology dictation and producing mailable or usable transcripts at job-indicated speeds.
2. Typing drafts and producing acceptable final copy from corrected drafts or handwritten copy. Proofreading of final copy.
3. Preparing stencil, spirit, or other reproducible masters and preparing appropriate number of copies using wet and/or dry process duplicators.
4. Indexing and filing incoming, outgoing, and processed materials. Retrieval of materials from general and specialized files and special reference sources.
5. Recording employer appointments and cancellations of appointments.
6. Practicing simple fiscal recordkeeping or payroll recordkeeping, using computational skills and office calculating machines.
7. Preparing special forms (shipping documents, insurance forms, legal and medical records, collection forms, payables, and receivables).
8. Receiving, identifying, and routing incoming mail. Posting outgoing mail.
9. Preparing routine business correspondence for employer.
10. Receiving incoming telephone calls and placing outgoing and conference calls. Use of internal communication system.
11. Greeting, interviewing, and directing visitors.
12. Recording activities in conjunction with specialized areas of work.
13. Preparing itineraries including making travel arrangements for employer (if possible).
14. Preparing meeting agenda, arranging for meeting facilities, and notifying participants.
15. Assisting copy editors, proofreaders, compositors, and printers.
16. Demonstrating acceptance of responsibilities and implementation of duties assigned that affect direction of others.
17. Taking testimony, deposition, and courtroom proceedings transcripts under super-

vision and control of responsible job holder. Comparing transcripts with legal and medical stenographers' and court reporters' official transcripts.

18. Assisting medical librarian or secretary of a medical department.
19. Assisting an engineering secretary in preparing bids, proposals, specifications, and materials lists.

EVALUATION OF TRAINEE

Arrangements should be made by the coordinating teacher with the person to whom the trainee is assigned to review items of completed work. These items should be discussed with the trainee to identify areas which need improvement. The trainee's speed and method of dictation-taking (including vocabulary problems) can be checked with the employing supervisor. A simple rating sheet for the trainee should be completed by the employer (or supervisor) and discussed with the coordinating teacher. The rating sheet should include such items as appearance, courtesy, ability to work well with others, office practice proficiency (machines, filing, telephone technique, dealing with visitors), quality of production (letters, reports, memoranda, and reproducible masters), use of special keyboard typewriters, and clerical skills. Periodic teacher-trainee conferences should be held to discuss trainee's rating and the possible need for remedial work. Final trainee job readiness evaluation in cooperative or work-study programs should be agreed upon by the employer, teacher, counselor, and trainee. Preparation for actual job seeking and placement should be started before this final phase.

USEFULNESS OF YOUTH CLUBS AND ORGANIZATIONS

The value of youth groups as a complementary activity to strengthen vocational education programs has been long recognized. The youth-club program serves to round out the classroom instruction and the job instruction by providing controlled methods of trainee-centered activities which relate to the participants' career objectives.

Supervision of youth-club activities by qualified vocational education teachers assures that trainees will participate in relevant work experience projects to the extent that they serve to simulate *office facilitating functions* of business. In addition, if properly planned, youth-club activities can serve to develop attitudes of cooperation and competition, appreciation of social values, and opportunities to practice communication skills, and to provide recognition of the individual for his achievement. Coordinating teachers, in their role as adviser to the youth groups, can enhance the importance of the youth organization as an adjunctive activity for complete vocational education.

APPENDIXES

APPENDIX A—Sample Suggested Lesson Plan

A good unit of instruction provides various kinds of learning activities including demonstrations, lectures, directed study, supervised practice, and examinations. These activities should be coordinated by the use of an effective teacher's lesson plan. A typical plan may include topics for presentation by lecture, motion picture or recording, individual or group activity, and formal or informal review, using discussion questions, oral examination, or written examination. Each separate activity should contribute its part to the completion of the unit. As much as possible, the lesson plan should be student-action oriented, having definite outcomes for the students in mind.

The following lesson plan illustrates suggested methods of unitizing material for class presentation under the appropriate sub-topic or topic of a typical course outline. The individual teacher may modify the detail in his own personal guide as his particular experience dictates. Rigorous adherence to the format is neither suggested nor implied. It is simply an instructional aid to be used when new or infrequently occurring subject content is to be presented.

SECRETARIAL ORIENTATION

Lesson No.: 14
Topic: Personality.
Lecture Time: 25 minutes.
Discussion Time: 13 minutes.
Motion Picture: 12 minutes.

Topics

I. Personality Value:
  A. High percentage of discharges because of personality deficiencies
  B. Effects of definciencies on co-workers
II. Personality Value to the Company:
  A. Major role of attitudes and personality traits in determining morale of a company
  B. Company image to public
III. Definition of Personality:
  A. Individual physical well-being
  B. Attitudes
  C. Ways of behaving, reaction to various stimuli (impulsiveness, anger, hostility)
  D. Opinions, prejudices, non-acceptance of others
IV. Group Discussion of Desirable and Undesirable Attitudes and Personality Traits
V. Activities:
  A. Have students list those behaviors which they do not like in others—general discussion
  B. Have students rate themselves on a behavioral check list—individual counseling where necessary
VI. Film: "Office Courtesy—Meeting the Public"[1]—Discussion

Reading Assignment: Two hours. Chap. 10 of MacGibbon, E. G., *Fitting Yourself for Business*. McGraw-Hill, 1961.

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[1] "Office Courtesy—Meeting the Public." MP–So–16 mm., 12 minutes. Color or black and white. Sold by Encyclopaedia Britannica Films, Inc., 1150 Wilmette Avenue, Wilmette, Ill. Selling price: black and white, $60; color, $120. Rental price: black and white, $3.50; color, $5.

APPENDIX B—Physical Facilities

Requirements for physical facilities cannot be estimated in advance for any particular location. These requirements will be affected by trainee populations, available instructional time, and the adequacy of present facilities. An example of a typical layout of classrooms and laboratories is included in this appendix for reference purposes.

The listings below have been prepared for typical classes ranging from 20 to 30 trainees; they are not related to the sample layout. If the number of trainees varies from those provided for in these suggestions, necessary adjustments will have to be made locally. Similarly, no quantity is indicated for items which may vary significantly in accordance with local needs.

Estimated costs for equipment and supplies reflect estimated price ranges in the New York City area. Some common stationery supplies (clips, carbon paper, bond paper, notepads, etc.) are not included in these listings.

Special Laboratory Equipment

A variety of automated laboratories for development of stenographic and language skills are available. Factors such as space availability and installation costs are not included in the price ranges of equipment. Handling capacities of each item vary. Suppliers' catalogs should be consulted. Special school prices are also in effect in many instances.

Dictation-Audio-Learning Laboratory Equipment—Range $100 to $4,500 (depending on number of stations used and features of equipment).

Dictation Transcribing Machine (single unit)—Range $103 to $407.

General Equipment

Quantity	Description	Estimated price range per unit (excluding tax)[1]
1	Tape recorder	$149–$339
1	3-speed phonograph	25– 60
1	Overhead projector	160– 250
1	Portable flannelboard, with accessories	25– 50
1	Filmstrip projector, 35-mm	109– 159
1	Sound motion picture projector, 16-mm	600– 800
2	Projection screens	20– 43
1	Slide projector, 2" × 2"	55– 175

[1] Prices quoted are as of October 1, 1966.

Typewriting Room

Quantity	Description	Estimated price range per unit (excluding tax)[1]
1	Special purpose dictionary as required (medical, foreign language, etc.)	$7– $12
1	Unabridged English dictionary	7– 10
1	Teacher's desk (top 32 × 54 inches) with chair	175– 225
30	Posture chairs	35– 70
30	Trainee desks or typing tables, adjustable from 27 to 30 inches high	13– 46
15	Standard manual typewriters (12 trainee, 1 teacher, 2 replacement)	157– 225
21	Electric typewriters (18 trainee, 1 teacher, 2 replacement)	280– 425
32	Copyholders	2– 8
1	Teacher typing table	13– 46
2	Filing cabinets (18 × 36 inches)	40– 60
1	Typewriting demonstration stand	37– 47
2	10-foot chalk boards	70– 80
1	10-foot bulletin board	120– 135
1	Metronome (used in typing)	11– 25
--	Miscellaneous equipment	-------

[1] Prices quoted are as of October 1, 1966.

Shorthand, Transcription, and General Room
(Dictation laboratory equipment listed separately)

Quantity	Description	Estimated price range per unit (excluding tax)[1]
2	10-foot chalk boards	$70– $80
1	Stenographer's stop watch	16– 25
1	Teacher's desk (top, 32 × 54 inches) with chair	225– 275
30	Straight desk chairs	20– 30
30	Trainee desks or tables, 29 and 30 inches high	20– 35
2	Filing cabinets (18 × 36 inches)	40– 60
1	Bookcase or open bookshelves	40– 50
1	Stenographic machine (single unit)	175– 375
--	Miscellaneous (trays, stapler, etc.)	-------

[1] Prices quoted are as of October 1, 1966.

Secretarial and Office Practice Room

Quantity	Description	Estimated price range per unit (excluding tax)[1]
1	Special purpose dictionary (medical, foreign language, etc., as required)	$7– $12
1	Unabridged English dictionary	7– 10
1	Teacher's desk (top 32 × 54 inches) with chair	225– 275
16	Straight desk chairs	20– 30
16	Trainee tables, varying from 27 to 30 inches high	20– 35
12	Adding machine tables, varying from 28 to 30 inches high	15– 20
6	Trainee typing tables, adjustable from 27 to 30 inches high	13– 46
4	Drop-head, single pedestal typing desks, with right-hand drawers	37– 47
6	Copyholders	2– 8
2	Worktables, 30 inches high (top, 30 × 50 inches)	300– 450
22	Posture chairs	35– 70
4	Standard electric typewriters	280– 425
1	Long carriage typewriter	180 - 350
1	Stencil duplicator, with cabinet	179– 395
1	Fluid duplicator, with cabinet	215– [illegible]20
2	10-key adding-listing machines	150– 200
4	Rotary calculators	139– 235
5	Standard typewriters	157– 225
2	Filing cabinets (18 × 36 inches)	40– 50
1	Bookcase or open bookshelves	40– 60
1	Offset duplicator	1,395– 2,250
1	Photo copier (wet)	125– 250
1	Photo copier (dry)	250– 450
2	10-foot chalk boards	70– 80

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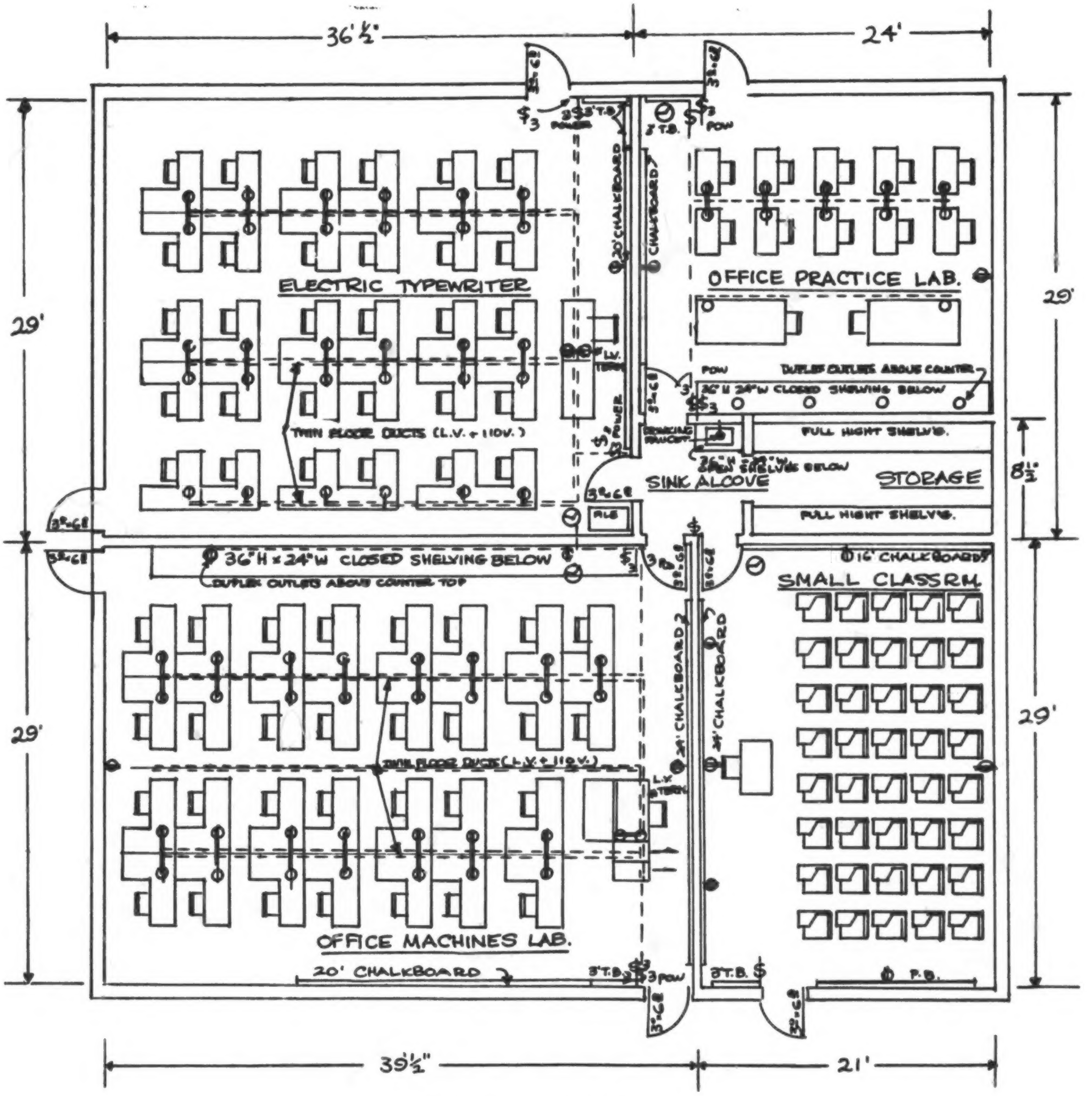
[1] Prices quoted are as of October 1, 1966.



36' ½"
24'
29'
29'
29'
29'
8½'
39½"
21'
ELECTRIC TYPEWRITER
OFFICE PRACTICE LAB.
SINK ALCOVE
STORAGE
SMALL CLASSRM.
OFFICE MACHINES LAB.
TWIN FLOOR DUCTS (L.V. + 110V.)
20' CHALKBOARD
CHALKBOARD
16' CHALKBOARD
24' CHALKBOARD
24' CHALKBOARD
36" H × 24" W CLOSED SHELVING BELOW
DUPLEX OUTLETS ABOVE COUNTER TOP
DUPLEX OUTLETS ABOVE COUNTER
36" H 24" W CLOSED SHELVING BELOW
FULL HIGHT SHELV'G.
FULL HIGHT SHELV'G.
36" H × 24" W OPEN SHELVES BELOW
DRINKING FAUCET
FILE
L.V. TERM.
POWER
POW
3 T.B.
P.B.
3⁰-6⁸

TYPICAL FACILITY LAYOUT

Adapted and modified from De Anza College layout. Courtesy: California State Department of Education

APPENDIX C–Sources of Educational Materials

Most of the materials listed in this guide are obtainable from the sources listed below. In addition, addresses for various periodical, guide, and directory publishers will be found in Appendix D. Whenever possible, street addresses and/or zip codes have been furnished.

Academic Press, Inc., 111 Fifth Ave., New York, N.Y. 10003
Addison-Wesley Publishing Co., Inc., Reading, Mass. 01867
Addressograph-Multigraph, 1200 Babbitt Road, Cleveland, Ohio 44117
Adjusto Equipment Co., Bowling Green, Ohio 43402
R. C. Allen Business Machines, Inc., 678 Front Ave., N.W., Grand Rapids, Mich. 49404
Allied Publishers, Inc., Portland, Oreg.
Allyn and Bacon, Inc., 150 Tremont St., Boston, Mass. 02111
American Association of School Administrators, 1201 16 St., N.W., Washington, D.C. 20006
American Bankers Association, 12 E. 36 St., New York, N.Y. 10016
American Book Company, 55 Fifth Ave., New York, N.Y. 10003
American Cancer Society, 521 W. 57 St., New York, N.Y. 10019
American Data Processing, Inc., 2200 Book Tower, Detroit, Mich. 48226
American Diabetes Association, 1 E. 45 St., New York, N.Y. 10017
American Economic Foundation, 51 E. 42 St., New York, N.Y. 10017
American Heart Association, 44 E. 23 St., New York, N.Y. 10010
American Management Association, 135 W. 50 St., New York, N.Y. 10020
American Medical Association, 535 N. Dearborn St., Chicago, Ill. 60610.
American Standards Association, 10 E. 40 St., New York, N.Y. 10036
Appleton-Century-Crofts, Inc., 34 W. 33 St., New York, N.Y. 10015
Arco Publishing Co., Inc., 480 Lexington Ave., New York, N.Y. 10017
Art Metal Construction Company, Jamestown, N. Y. 14701
Association Films, Inc., 600 Madison Ave., New York, N.Y. 10022
Audio-Visual Research, 523 S. Plymouth Court, Chicago, Ill.
Automation Institute Publishing Co., 821 Market St., San Francisco, Calif. 94103
Automobile Manufacturers Association, 320 New Center Bldg., Detroit, Mich. 48202
Bailey Films, 6509 De Longpre Ave., Hollywood, Calif. 90028
Baker, Voorhis and Co., Inc., 30 Smith Ave., Mount Kisco, N.Y. 10549
Banks-Baldwin Law Publishing Co., 1904 Ansel Road, Cleveland, Ohio 44106
A. S. Barnes and Co., 11 E. 36 St., New York, N.Y. 10016
Barnes and Noble, Inc., 105 Fifth Ave., New York, N.Y. 10003
Barry College, 11300 N.E. Second Ave., Miami, Fla. 33161
Beacon Press, 25 Beacon St., Boston, Mass. 02108
Bell Telephone Operating Companies, 140 West St., New York, N.Y. 10012
Charles Beseler and Co., 219 S. 18 St., East Orange, N.J. 07018
British Information Service, 30 Rockefeller Plaza, New York, N.Y. 10022
William C. Brown Co., Publishers, 135 S. Locust St., Dubuque, Iowa 52002
Burroughs Corporation, 219 Park Ave., S., New York, N.Y. 10003
Business Education Films, 4607 16 Ave., Brooklyn, N.Y. 11204
Business Education Publishers, Inc., Box 72, Foothill Station, Salt Lake City, Utah 84108
The Business Press, 288 Park Ave., W., Elmhurst, Ill. 60126
Business Teachers Guide, P.O. Box 114, Conway, N.H. 03818
Wesley S. Cadmus, 51 Fenwick St., Hartford, Conn. 06114
California State Department of Education, 721 Capital Mall, Sacramento, Calif. 95814
Callaghan & Company, 6141 N. Cicero Ave., Chicago, Ill. 60646
Cambridge University Press, 32 E. 57 St., New York, N.Y. 10022
Carter's Ink Company, 80 Varick St., New York, N.Y. 10013
Castle Films, R.C.A. Building, 30 Rockefeller Plaza, New York, N.Y. 10020
Champion Paper and Fiber Co., Hamilton, Ohio 45013
City College of New York, 17 Lexington Ave., New York, N.Y. 10010
Classiques Hatchette, 79 Boulevard Saint Germain, Paris 6, France
College Entrance Book Co., 104 Fifth Ave., New York, N.Y. 10011
Columbia University Press, 2960 Broadway, New York, N.Y. 10027
Continental Illinois National Bank and Trust Co., 231 LaSalle St., Chicago, Ill. 60690
Coronet Instructional Films, 65 E. South Water St., Chicago, Ill. 60601
George F. Cram Company, Inc., 730 E. Washington St., Indianapolis, Ind. 46207
E. D. Crim Publications, 4271 Leimert Blvd., Los Angeles, Calif. 90008
Thomas Y. Crowell Co., 201 Park Ave. S., New York, N.Y. 10003
Dartnell Corp., 4660 Ravenswood Ave., Chicago, Ill. 60640
Data Processing Management Association, 524 Busse Highway, Park Ridge, Ill. 60068
F. A. Davis Co., 1914 Cherry St., Philadelphia, Pa. 19103

Department of Public Instruction, Commonwealth of Pennsylvania, Harrisburg, Pa. 17126

A. B. Dick Company, 5700 West Touhy Ave., Chicago, Ill. 60648

Dictation Disc Company, 170 Broadway, New York, N.Y. 10038

Ditto, Inc., Harrison at Oakley Blvd., Chicago, Ill. 60612

Doubleday and Co., Inc., 575 Madison Ave., New York, N.Y. 10022

Eastman Kodak Company, 343 State St., Rochester, N.Y. 14650

Editiones Foucher, 128 Rue de Rivoli, Paris 1, France

Education Research Committee, 777 14 St., Washington, D.C. 20005

Educational Developmental Laboratories, Inc., 75 Prospect St., Huntington, N. Y. 11744

Educational Records Bureau, 21 Audubon Ave., New York, N.Y. 10032

Educational Supplies and Services, 1650 N. Serrano Ave., Los Angeles, Calif. 90027

Educators Progress Service, Randolph, Wis. 53956

Ellman Associates, 185 N. Wabash St., Chicago, Ill. 60606

Employers Mutual of Wausau, Wausau, Wisconsin 54401

Encyclopaedia Britannica Films, Inc., 1150 Wilmette Ave., Wilmette, Ill. 60091

Follett Publishing Co., 1010 W. Washington Blvd., Chicago, Ill. 60607

Forkner Publishing Co., Inc., 106 Morningside Drive, New York, N.Y. 10027

Free Press of Glencoe, 60 Fifth Ave., New York, N.Y. 10011

Funk and Wagnalls Co., 360 Lexington Ave., New York, N.Y. 10017

Garden City Books, 501 Franklin Ave., Garden City, N.Y. 11535

General Services Administration, Washington, D.C. 20405

Ginn and Co., Statler Office Bldg., Boston, Mass. 02117

Globe Book Company, 175 Fifth Avenue., New York, N.Y. 10010

Gordon and Breach, 150 Fifth Ave., New York, N.Y. 10010

Grolier Co., 575 Lexington Ave., New York, N.Y. 10022

Grosset & Dunlap, 1107 Broadway, New York, N.Y. 10010

Harcourt, Brace, and World, 757 Third Ave., New York, 10017

Harper and Bros. (See Harper and Row)

Harper and Row, Publishers, 49 E. 33 St., New York, N.Y. 10016

D. C. Heath and Co., 285 Columbus Ave., Boston, Mass. 02116

Hofstra College Bookstore, 1000 Fulton Ave., Hempstead, N.Y. 11550

Henry Holt and Co. (See Holt, Rinehart and Winston, Inc.)

Holt, Rinehart and Winston, Inc., 383 Madison Ave., New York, N.Y. 10017

Horder's Inc., 231 S. Jefferson St., Chicago, Ill. 60606

Houghton Mifflin Co., 2 Park St., Boston, Mass. 02108

Household Finance Corp., 555 Fifth Ave., New York, N.Y. 10017

IBM Corp., 590 Madison Ave., New York, N.Y. 10022

Indiana Bell Telephone Co., 240 N. Meridian St., Indianapolis, Ind. 46204

Industrial Education Institute, Boston, Mass.

Industrial Press, 93 Worth St., New York, N.Y. 10013

Internal Revenue Service, U.S. Department of the Treasury, Washington, D.C. 20220

International Business Machines Corp., 590 Madison Ave., New York, N.Y. 10022

International Correspondence Schools, Scranton, Pa. 18515

Richard D. Irwin, Inc., 1818 Ridge Rd., Homewood, Ill. 60430

Karwood Company, P.O. Box 133, Milwaukee, Wis. 53213

Kerlin Graphics Co., Box 58, Elnora, N.Y. 12065

Keystone View Company, Meadville, Pa. 16335

Kinescope NET, Channel 13, New York, N.Y.

Alfred A. Knopf, Inc., 501 Madison Ave., New York, N.Y. 10022

Russell W. Kraning, Indiana University, Gary Center, Gary, Ind. 46408

Ladies Home Journal, P.O. Box 1155, Weston, Conn. 06388

Lafayette Instrument Company, Lafayette, Ind. 47906

Legget, Mead, and Charvat, Englewood Cliffs, N.J. 07632

Librairie Larousse, 17 Rue de Montparnasse, Paris 6, France

J. B. Lippincott Co., E. Washington Square, Philadelphia, Pa. 19105

Longmans, Green and Co., 55 Fifth Ave., New York, N.Y. 10011

Lyons and Carnahan, 2500 Prairie Ave., Chicago, Ill. 60616

The Macmillan Co., 60 Fifth Ave., New York, N.Y. 10011

Carl F. Mahnke Productions, 215 E. 3 St., Des Moines, Iowa 50309

McGraw-Hill, Inc., 330 W. 42 St., New York, N.Y. 10036

David McKay Co., Inc., 119 W. 40 St., New York, N.Y. 10018

G. and C. Merriam Co., 47 Federal St., Springfield, Mass. 01105

Charles E. Merrill Books, Inc., 1300 Alum Creek Drive, Columbus, Ohio 43216

Metropolitan Life Insurance Co., 1 Madison Ave., New York, N.Y. 10010

Milady Publishing Corp., 3839 White Plains Rd., Bronx, N.Y. 10467

Minneapolis-Honeywell Regulator Co., Wayne and Windrim Aves., Philadelphia, Pa. 19144

Modern Talking Picture Service, 3 E. 54 St., New York, N.Y. 10022

Monroe Calculating Machines Co., Educational Dept., 550 Central Ave., Orange, N.J. 07051

Moore Business Forms, 210 Post St., San Francisco, Calif. 94108

The C. V. Mosby Co., 3207 Washington Blvd., St. Louis, Mo. 63103

National Association for Mental Health, 10 Columbus Circle, New York, N.Y. 10019

National Association of Educational Secretaries, 1201 16th St. N.W., Washington, D.C. 20036

National Association of Legal Secretaries, 146 N. San Fernando Blvd., Burbank, Calif. 91502 (National office: 6953 Columbia Place, University City 30, Mo.)

National Association of Secondary School Principals, 1201 16th St., N.W., Washington, D.C. 20006

National Blank Book Co., Holyoke, Mass. 01040

National Foreman's Institute, Inc., Bureau of Business Practice, 100 Garfield Ave., New London, Conn. 06320

National Industrial Conference Board, Inc., 460 Park Ave., New York, N.Y. 10022

National Secretaries Association, 427 West 51 Street, New York, N.Y. 10019

National Shorthand Reporters' Association, 88-11 Sulphin Blvd., Jamaica, N.Y. 11435

Nation's Business, 1615 H St., N.W., Washington, D.C. 20006

New York University Press, Press Building, 32 Washington Place, New York, N.Y. 10003

Office Publications, Inc., 60 E. 42 St., New York, N.Y. 10017

Office Research Institute, Box 744N, Miami, Fla. 33143

Ohio Typewriter Service, 3759 N. Berkeley, Cincinnati, Ohio 45236

Oxford Book Co., Inc., 71 Fifth Ave., New York, N.Y. 10003

Oxford Filing Supply Co., Inc., Clinton Rd., Garden City, N.Y. 11535
Oxford University Press, 417 Fifth Ave., New York, N.Y. 10016
Parker Publishing Co., West Nyack, N.Y. 10994
Perceptual Development Laboratories, St. Louis 5, Mo.
Physician's Record Company, Chicago, Ill.
Pitman Publishing Corp., 2 W. 45 St., New York, N.Y. 10036
Poster Visual Aids, 58 Union St., Milford, N.H. 03055
Prentice-Hall, Inc., Route 9W, Englewood Cliffs, N.J. 07632
Random House, 457 Madison Ave., New York, N.Y. 10022
Reinhold Publishing Corp., 430 Park Ave., New York, N.Y. 10022
Remington Rand, Division of Sperry-Rand Corp., 315 Fourth Ave., New York, N.Y. 10010
Republic Book Company, 115 E. 53 St., New York, N.Y. 10022
Reuter and Bragdon, 4 Gateway Center, Pittsburgh, Pa. 12555
John F. Rider, 116 W. 14 St., New York, N.Y. 10011
The Ronald Press Co., 15 E. 26 St., New York, N.Y. 10010
H. M. Rowe Co., 624 North Gilmor St., Baltimore, Md. 21217
Royal McBee Corp., 850 Third Ave., New York, N.Y. 10022
Royal Typewriter Co., 2 Park Ave., New York, N.Y. 10016
Howard Sams and Co., 3 W. 57th St., New York, N.Y. 10019
W. B. Saunders Co., W. Washington Square, Philadelphia, Pa. 19103
Scholastic Magazines, 50 W. 44 St., New York, N.Y. 10036
Science Research Associates, 259 E. Erie St., Chicago, Ill. 60611
Scott, Foresman, and Co., 433 E. Erie St., Chicago, Ill. 60611
Simon and Schuster, Inc., 630 Fifth Ave., New York, N.Y. 10020
L. W. Singer Co., Inc., 249-259 W. Erie Blvd., Syracuse, N.Y. 13202
Smead Manufacturing Company, 309-311 Second Ave., Hastings, Minn. 55033
Smith-Corona-Marchant, Inc., 410 Park Ave., New York, N.Y. 10022
Society for French American Cultural Services and Educational Aid, 972 Fifth Ave., New York 21, N.Y.
Society for Visual Education, Inc., 1345 W. Diversey Parkway, Chicago, Ill. 60614
Somerset Press, 36 Main St., Somerville, N.J. 08876
Sound Education, Box 414, Port Huron, Mich. 48061
Soundscriber Corp., 140 Munson St., New Haven, Conn. 06711
South-Western Publishing Co., Inc., 5101 Madison Rd., Cincinnati, Ohio 45227
Special Teaching Aids, 3408 N. Potomac St., Arlington, Va. 22213
Sperry-Rand Corporation, 1290 Avenue of the Americas, New York, N.Y. 10017
Standard Packaging Corp., Advertising Mgr., 200 E. 43 St., New York, N.Y. 10017
Standard Register Company, 250 Park Ave., New York, N.Y. 10017
Stanford University Press, Stanford, Calif. 94305
State University of Iowa, Ames, Iowa 50012
Stenographic Machines, Inc., Skokie, Ill. 60076
Stenoscript ABC Shorthand, 7817 Norfolk Ave., Bethesda, Md. 20014
Stenotype Co., 417b S. Dearborn St., Chicago, Ill. 60605
Stereo Optical Company, Chicago, Ill.
Sterling Publishing Co., 419 Park Ave., S., New York, N.Y. 10016
Henry Strauss and Co., Inc., 31 W. 53 St., New York, N.Y. 10017
Superintendent of Documents, U.S. Government Printing Office, N. Capitol between G and H Sts., N.W., Washington, D.C. 20402
System Development Corp., 350 Fifth Ave., New York, N.Y. 10001
Systems and Procedures Association, Cleveland, Ohio
Teaching Aids Exchange, 307 South B St., San Mateo, Calif. 94401
Edward Thompson Co., 399 Gold St., Brooklyn, New York, N.Y. 11201
Underwood Corporation, 1 Park Ave., New York, N.Y. 10016
United Business Schools Association, 1518 K St., N.W., Washington, D.C. 20005
U.S. Department of Health, Education, and Welfare, Office of Education, Washington, D.C. 20202
U.S. Government Printing Office, N. Capitol between G and H Sts., N.W., Washington, D.C. 20402
United World Films, Inc., 1445 Park Ave., New York, N.Y. 10029
University Microfilms, 313 N. First St., Ann Arbor, Mich. 48104
University of California, Berkeley, Calif. 94720
University of Chicago, Chicago, Ill. 60637
University of Colorado, Boulder, Colo. 80302
University of Michigan, Ann Arbor, Mich. 48103
University of Minnesota Press, Minneapolis, Minn. 55455
University of Southern California, Los Angeles, Calif. 90007
University of the State of New York, State Education Department, Albany, N.Y. 12201
University of Utah, Salt Lake City, Utah 84112
University Publishing Co., 1126 Que St., Lincoln, Nebr. 68501
D. Van Nostrand Co., Inc., 120 Alexander St., Princeton, N.J. 08541
Victor Adding Machine Co., Business Education Dept., Chicago, Ill. 60618
Wadsworth Publishing Co., 10 Davis Drive, Belmont, Calif. 94002
West Publishing Co., St. Paul, Minn.
Westland Printing Co., 1234 West 7th St., Los Angeles, Calif. 90017
John Wiley and Sons, 440 Fourth Ave., New York, N.Y. 10016
The World Publishing Co., 119 W. 57 St., New York, N.Y. 10017
Yale University Press, 206 Elm St., New Haven, Conn. 06711
Ziff-Davis (see A. S. Barnes and Co.)

APPENDIX D—Other Instructional and Reference Materials

The following instructional materials may not have been previously listed under study units. They are listed here to assist teachers in quickly locating materials—texts, references, films, filmstrips, periodicals, guides, directories, and other audio-visual aids—appropriate to the various curricula subject areas.

TEXTS AND REFERENCES

Manual Shorthand

Eldridge, Edward H. *New Shorthand Dictation Exercises.* New York: Pitman, 1958.

Forkner, Hamden L.; Osborne, Agnes E.; and O'Brien, James E. *Correlated Dictation and Transcription, Gregg Simplified.* Boston: D. C. Heath, 1950.

Gregg, John Robert; Leslie, Louis A.; and Zoubek, Charles E. *Gregg Speed Building Simplified. 2nd ed.* New York: McGraw-Hill, 1957.

———. *Most-Used Shorthand Words and Phrases, Simplified. 2nd ed.* New York: McGraw-Hill, 1953.

Hosler, Russell; Grubbs, Robert; and Wagoner, G. *Gregg Transcription for Colleges, Simplified.* New York: McGraw-Hill, 1959.

Klein, Abraham E. *Graded Drills in Gregg Shorthand Simplified.* New York: McGraw-Hill, 1951.

Leslie, Louis A.; and Zoubek, Charles E. *Dictation for Transcription, Diamond Jubilee Series.* New York: McGraw-Hill, 1963.

———. *Graded Transcribing Tests in Gregg Shorthand Simplified, 2nd ed.* New York: McGraw-Hill, 1955.

———. *Gregg Shorthand Manual Simplified, Functional Method, 2nd ed.* New York: McGraw-Hill, 1955.

———. *Gregg Transcription Simplified, 2nd ed.* New York: McGraw-Hill, 1956.

Leslie, Louis A.; Zoubek, Charles E.; and Hosler, Russell J. *Gregg Shorthand Simplified for Colleges, Volume II, 2nd ed.* New York: McGraw-Hill, 1958.

Steps to Success in Shorthand, Book I, Combined Edition. New York: Pitman, 1947.

Steps to Success in Shorthand, Book I, Longhand Edition. New York: Pitman, 1947.

Steps to Success in Shorthand, Book I, Shorthand Edition. New York: Pitman, 1947.

Steps to Success in Shorthand, Book II, Combined Edition. New York: Pitman, 1948.

Steps to Success in Shorthand, Book II, Longhand Edition. New York: Pitman, 1948.

Steps to Success in Shorthand, Book II, Shorthand Edition. New York: Pitman, 1948.

Typewriting

Bell, Mary L. *Speed Typing, 3rd ed.* Cincinnati: South-Western, 1958.

Bowman, Wallace B. *Business Letter Typing.* Cincinnati: South-Western, 1957.

Committee on College Typewriting. *College Typewriting—First Year Course.* New York: Pitman, 1961.

Dunford, Nelson James. *A Handbook for Technical Typists.* New York: Gordon and Breach.

Green, Helen H. *Activities Handbook for Business Teachers.* New York: McGraw-Hill, 1958.

Grossman, Jack, and Friedman, Sherwood. *Handbook for Typists, 2nd ed.* New York: Pitman, 1960.

Hossfield, George L., and Nelson, Julius. *Faster Typing.* Baltimore: H. M. Rowe Co., 1959.

Reigner, Charles G. *Typing for Accuracy, 5th ed.* Baltimore: H. M. Rowe Co., 1958.

Reigner, Charles G., and Rygiel, Walter S. *Rowe Typing, 4th ed.* Baltimore: H. M. Rowe Co., 1958.

Russon, Allen R., and Wanous, S. J. *Philosophy and Psychology of Teaching Typewriting.* Cincinnati: South-Western, 1960.

Scott, Wesley E.; Hamilton, William J.; and Hertfeld, Arthur. *Modern Basic Typewriting, 2nd ed.* New York: Pitman, 1962.

Smith, Charles E. *Practical Course in Typewriting, 19th ed.* New York: Pitman, 1959.

Wanous, S. J. *Statistical Typing, 2nd ed.* Cincinnati: South-Western, 1956.

Secretarial Practices

Becker, Esther R., and Lawrence, Richard L. *Success and Satisfaction in Your Office Job.* New York: Harper and Co., 1954.

Burke, M. C. *The Executive Secretary.* Garden City, N.Y.: Doubleday and Co., 1959.

Carney, Marie L. *Etiquette in Business.* New York: McGraw-Hill, 1948.

Cox, H. L. *How To Write a Letter.* New York: Sterling Publishing Co., 1966.

MacGibbon, E. G. *Fitting Yourself for Business, 4th ed.* New York: McGraw-Hill, 1949.

———. *Manners in Business.* New York: McGraw-Hill, 1954.

Taintor, Sarah A., and Monro, Kate M. *Secretary's Handbook.* New York: Macmillan, 1958.

Office Machines

Keelon, John K. *Tested Problems for Calculators and Listing Machines.* Englewood Cliffs, N.J.: Prentice-Hall, 1959.

National Office Management Association. *Practical Office Time Savers, Vol. II.* New York: McGraw-Hill, 1947.

Richards, William A., and Woodward, Robert. *Duplication Do's and Don'ts.* Portland, Oreg.: Allied Publishers, 1959.

Straub, Lura Lynn, and Gibson, E. Dana. *Liquid Duplicating Systems*. Dubuque, Iowa: William C. Brown Co., 1960.

Waltz, Loren E. *Problems in Office Services*. Bloomington, Ind.: Bureau of Business Research, School of Business, Indiana University, 1958.

Business Mathematics

Dutton, W. H., and Adams, L. J. *Arithmetic for Teachers*. Englewood Cliffs, N.J.: Prentice-Hall, 1961.

Kanger, E. M., and Schaaf, W. L. *Essentials of Business Arithmetic*. Boston: D. C. Heath, 1960.

McMackin, F. J.; Marsh, J. A.; and Baten, C. E. *Arithmetic of Better Business*. Boston: Ginn and Co., 1959.

Mallory, V. S., and others. *Commercial Arithmetic*. Syracuse, N.Y.: L. W. Singer Co., 1596.

Snyder, L. R. *Essential Business Mathematics, 4th ed.* New York: McGraw-Hill, 1963.

Fiscal Records

Goodfellow, Raymond C., and Rosenberg, Henry J. *Projects in Clerical Practice, 2nd ed.* Cincinnati: South-Western, 1957.

Marti, D. B. *Income Tax and Social Security Course, 16th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1962.

Wolpert, Saul. *Bookkeeping and Accounting: Introductory Course, 7th ed.* Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Communication and Language Skills
(including Business Terminology)

Carey, Clarence B. *Business Speller and Vocabulary Builder, 2nd ed.* New York: Pitman, 1960.

Handy, Ralph S. *Business Correspondence in Practice, 3rd ed.* New York: Pitman, 1962.

Ingram, Karl Cultan. *Talk That Gets Results—Communication: Key to Success and Harmony with Others*. New York: McGraw-Hill, 1957.

Keithley, Erwin M. *A Manual of Style for the Preparation of Papers and Reports*. Cincinnati: South-Western, 1959.

Mayo, Lucy. *Communications Handbook for Secretaries*. New York: McGraw-Hill, 1958.

Miller, B. M., Editor. *Private Secretary's Encyclopedia Dictionary*. Englewood Cliffs, N.J.: Prentice-Hall, 1958.

Nanassy, Louis C., and Selden, William. *Business Dictionary*. Englewood Cliffs, N.J.: Prentice-Hall, 1960.

Parkhurst, Charles C. *Practical Problems in English for Business, 3rd ed.* New York: Pitman, 1962.

Reigner, Charles G. *College English for Business, 2nd ed.* Baltimore: H. M. Rowe Co., 1961.

Sheppard, M. *Plain Letters—The Secret of Successful Business Writing*. New York: Simon and Schuster, 1960.

Strang, Ruth, and Bracken, Dorothy. *Making Better Readers*. Boston: D. C. Heath, 1957.

U.S. Government Printing Office. *Style Manual*. Washington: Superintendent of Documents, U.S. Government Printing Office, 1959.

Business Principles and Organization

Aberle, J. W.; Sielaff, T. J.; and Mayer, F. L. *General Business for Today and Tomorrow*. Englewood Cliffs, N.J.: Prentice-Hall, 1959.

McNaughton, W. L. *Introduction to Business Enterprise*. New York: John Wiley and Sons, 1960.

Reed, C. A.; Conover, H. H.; and Stearns, R. E. *Introduction to Business*. Boston: Allyn and Bacon, 1958.

Tonne, H. A.; Simon, S. I.; and McGill, E. C. *Business Principles, Organization, and Management*. New York: McGraw-Hill, 1958.

Business Data Processing

Many references are listed in U.S. Office of Education publication OE–86010, *Electronic Business Data Processing Peripheral Equipment Occupations*. Washington: Superintendent of Documents, U.S. Government Printing Office, 1964.

Economics and International Trade

Dodd, J. Harvey; Kennedy, John W.; and Olsen, Arthur R. *Applied Economics, 6th ed.* Cincinnati: South-Western, 1962.

Holt, Sol. *Economics and You, 2nd ed.* New York: Scribner's, 1962.

Packard, Leonard O.; Overton, Bruce; and Wood, Ben D. *Geography of the World*. New York: Macmillan, 1959.

Smith, Augustus H. *Economics for Our Times, 3rd ed.* New York: McGraw-Hill, 1959.

Van Cleef, Eugene, and Finney, John C. *Global Geography*. Boston: Allyn and Bacon, 1959.

Consumer Education

Scott, Wesley E.; Kirk, John G.; Kane, Fred; and Buckley, Harold B. *Everyday Consumer Business*. Englewood Cliffs, N.J.: Prentice-Hall, 1959.

Legal

McKinney's Consolidated Laws of New York, Annotated. New York: Edward Thompson Co.

Medical

Agnew, Peter L., and Atkinson, Phillip. *Medical Office Practice*. Cincinnati: South-Western, 1966.

Coffin, Kenneth B., and Colwell, Forrest R. *The Medical Secretary*. New York: Macmillan, 1959.

Frederick, Portia M., and Towner, Carol. *The Office Assistant in Medical or Dental Practice, 2nd ed.* Philadelphia: W. B. Saunders Co., 1961.

Root, Kathleen Berger, and Byers, Edward E. *Gregg Text-Tapes for Medical Dictation and Transcription*. New York: McGraw-Hill, 1960.

Technical Writing

Weisman, Herman M. *Basic Technical Writing*. Columbus, Ohio: Charles E. Merrill Books, 1962.

Record Management

Zitmore, Irving. *Planning a Records Management Survey*. Washington: The American Archivist, April 1955.

PERIODICALS, GUIDES, AND DIRECTORIES

It is suggested that the teacher become acquainted with some of the following materials. Their contents are both specific and general, and may be applicable to several areas of business education.

Administrative Management. Geyer-McAllister, 212 Fifth Avenue, New York, N.Y. 10010

American Archivist. The Society of American Archivists, The National Archives, Washington, D. C. 20408

American Business. 4660 Ravenswood Ave., Chicago, Ill. 60640

American Business Education Yearbooks. New York University Bookstore, Washington Sq., New York, N.Y. 10010

Audio-Visual Aids for Data Processing System and Automation. 1963, Data Processing Management Association, 524 Busse Highway, Park Ridge, Ill. 60068

Automation. A Penton Publication, Penton Building, Cleveland, Ohio 44013

Balance Sheet. South-Western Publishing Co., Inc., 5101 Madison Rd., Cincinnati, Ohio 45227

Business Automation. OA Business Publications, Inc., 288 Park Avenue West, Elmhurst, Ill. 60126

Business Education World. McGraw-Hill, 330 W. 42 St., New York, N.Y. 10036

Business Management. Management Magazines, Inc., 22 W. Putnam Ave., Greenwich, Conn. 06830

Business Newsmagazine. Alsen Publishing Co., 1445 N. Fifth St., Milwaukee, Wis. 53212

Business Screen. Business Screen Magazine, Inc., 7064 Sheridan Rd., Chicago, Ill. 60626

Business Teacher. McGraw-Hill, 330 W. 42 St., New York, N.Y. 10036

Business Week. McGraw-Hill, 330 W. 42 St., New York, N.Y. 10036

Check List of All Available Teaching Aids. Prentice-Hall, Englewood Cliffs, N.J. 07632

Data Processing for Education. American Data Processing, Inc., 2200 Book Tower, Detroit, Mich. 48226

Data Processing for Management. American Data Processing, Inc., 2200 Book Tower, Detroit, Mich., 48226

Data Processing Yearbook. American Data Processing, Inc., 2200 Book Tower, Detroit, Mich., 48226

Directory of Films About Property, Casualty and Surety Insurance. Insurance Information Institute, 110 William St., New York, N.Y. 10038

Directory of 2660 16mm Film Libraries. U.S. Department of Health, Education, and Welfare, Washington, D.C. 20202

Eastern Business Teachers Association Yearbooks. Somerset Press, Somerville, N.J.

Educators Guide to Free Films. Educators Progress Service, Dept. AVG, Randolph, Wis. 53956

Educators Guide to Free Slidefilms. Educators Progress Service, Dept. AVG, Randolph, Wis. 53956

Electronics World. A. S. Barnes and Co., 11 E. 36 St., New York, N.Y. 10016

Financial Executive. Financial Executives Institute, 50 W. 44 St., New York, N. Y. 10036

International Business Automation. OA Business Publications, Inc., 288 Park Avenue West, Elmhurst, Ill. 60126

Journal of Accountancy. American Institute of Certified Public Accountants, 666 Fifth Ave., New York, N.Y. 10019

Journal of the American Medical Association. American Medical Association, 535 N. Dearborn St., Chicago, Ill. 60610.

Journal of the American Society of Training Directors. American Society of Training Directors, 2020 University Ave., Madison, Wis. 53705

Journal of College Placement. College Placement Council, Inc., 35 E. Elizabeth Ave., Bethlehem, Pa. 18018

Journal of Data Management. Data Management Association, 524 Busse Highway, Park Ridge, Ill. 60068

La Revista Gregg. McGraw-Hill, 330 W. 42 St., New York, N.Y. 10036

Modern Office Procedures. Industrial Publishing Corp., 812 Huron Road, Cleveland, Ohio 44115

Nations Business. U.S. Chamber of Commerce, 1615 H. St., N.W., Washington, D.C. 20006

Personnel Market Place. Merchandiser Publishing Co., Inc., 417 Park Ave. S., New York, N.Y. 10016

Personnel Procedure Manuals, A Research Report from the Conference Board. National Industrial Conference Board, Inc., 460 Park Ave., New York, N.Y. 10022

P. I. Instructor. Charm Division, Milady Publishing Corp., 3839 White Plains Rd., Bronx, N.Y. 10467

Pitmanite. Pitman, 2 W. 45 St., New York, N.Y. 10036

Reproduction Methods for Business and Industry. R. M. Gellert-Wolfman Publishing Co., 33 W. 60 St., New York, N.Y. 10023

Scientific American. Scientific American, Inc., 415 Madison Ave., New York, N.Y. 10017

Secretaire Magazine. Secretaire Magazine, 11 Rue de Florence, Paris, 8^e, France

Systems. United Business Publications, Inc., 200 Madison Ave., New York, N.Y. 10016

Today's Secretary. McGraw-Hill, 330 W. 42 St., New York, N.Y. 10036

Typewriting News. South-Western, 5101 Madison Rd., Cincinnati, Ohio 45227

The Typing Teacher. 3200 Southgreen Rd., Baltimore, Md. 21207

Visual Aids for Business and Economic Education, rev. 1961. (Monograph 92). South-Western Publishing Co., Inc., 5101 Madison Rd., Cincinnati, Ohio 45227

Visual Aids and Reading References on Business Careers, (Monograph 84). South-Western Publishing Co., Inc., 5101 Madison Rd., Cincinnati, Ohio 45227

FILMS AND FILMSTRIPS

Note: The following abbreviations are used in film and filmstrip descriptions.

BW—Black and White.
Col —Color.
FS —Filmstrip.
Min.—Running time in minutes.
MP—Motion Picture.
Si —Silent.
So —Sound.

Accounting and Calculating Machines. MP–So–BW–12 min. Teaching Aids Exchange.

Accounting Cycle Director Ledger Entry, The. FS–Si. Business Education Films.

Accounting Series. 11 FS–Si–BW. McGraw-Hill.

As Others See Us. MP–So–BW–10 min. British Information Service.

Automatic Computers. MP–So–Col–16 min. International Business Machines Corp.

Automation. A CBS NEWS "See It Now" Production. MP–So–BW–84 min. McGraw-Hill.

Banks and Credit. MP–So–BW–10 min. Coronet Instructional Films.

Base and Place. MP–So–BW–30 min. University of Colorado.

Basic Typing—Machine Operation. MP–So–BW–30 min. United World Films, Inc.

Beauty of It, The. FS–So–Col–30 min. Burroughs Corp.

Better Choice of Words. MP–So–BW/Col–11 min. Coronet Instructional Films.

Better Typing at Your Fingertips. MP–So–Col–30 min. Modern Talking Picture Service.

Bookkeeping and Accounting. MP–So–BW–11 min. Carl F. Mahnke Productions.

Bookkeeping and Accounting Errors. FS–Si–BW. Business Education Films.

Bookkeeping and You. MP–So–Col/BW–11 min. Coronet Instructional Films.

Bookkeeping Cycle, The. FS–Si. Society for Visual Education, Inc.

Bookkeeping Series. 6 FS–Si–BW. McGraw-Hill.

Build Your Vocabulary. MP–So–Col/BW–10 min. Coronet Instructional Films.

Building Typing Skills. MP–So–Col/BW–11 min. Coronet Instructional Films.

Business Education Series. 6 FS–Si–Col. McGraw-Hill.

Business Etiquette Series. 11 FS–Si–BW. McGraw-Hill.

By the Numbers. MP–So–Col–16 min. International Business Machines Corp.

Can You Read Gregg. MP–So–BW–19 min. Teaching Aids Exchange.

Cards That Count, The. MP–So–Col–15 min. International Business Machines Corp.

Consumer Protection. MP–So–BW–11 min. Coronet Instructional Films.

Controlling Accounts. FS–Si–BW. Business Education Films.

Correct Telephone Usage. MP–So–BW–19 min. Business Education Films.

Cost That Make Sense. MP–So–Col–15 min. International Business Machines Corp.

Data Processing for Hospitals. MP–So–Col–16 min. International Business Machines Corp.

Data Processing for the Wholesale Drug Industry. FS–So–Col. International Business Machines Corp.

Distribution Accounting. FS–So–Col. International Business Machines Corp.

Do You Know Your Typewriter? FS–Si–BW. Society for Visual Education, Inc.

Donald in Mathmagic Land. MP–So–Col–28 min. University of Michigan.

Duties of a Secretary. FS–So–Col. Business Education Division, Underwood Corp.

Effective Listening. MP–So–BW–15 min. McGraw-Hill.

Eight Parts of a Business Letter. MP–So–Col/BW–11 min. Business Education Films.

Electric Typing Time. MP–So–Col–20 min. International Business Machines Corp.

Filing Procedures in Business. MP–So–Col/BW–11 min. Coronet Instructional Films.

Flow Process Chart, The. MP–So–Col–15 min. City College of New York.

Flow Process Chart and How To Use It. MP–So–Col–15 min. University of Michigan.

Fundamentals of English Series. 6 FS–Si–Col. McGraw-Hill.

General Mathematics—Business Mathematics Course. 25 FS–Si–BW. (Teacher Manual) Educational Developmental Laboratories.

Grammar: Verbs and Ways We Use Them. MP–So–Col/BW–11 min. Coronet Instructional Films.

Gregg Shorthand Beginning Course. FS–Si–Col/BW. Educational Developmental Laboratories.

Gregg Typewriting Series. Set I and Set II. 14 FS–So–12 min. per filmstrip. McGraw-Hill.

Hospital Accounting. FS–So–Col. International Business Machines Corp.

How To Balance Accounts. FS–Si–BW. Business Education Films.

How To Be Well Groomed. MP–So–Col/BW–10 min. Coronet Instructional Films.

How To Keep a Job. MP–So–Col–11 min. Coronet Instructional Films.

How To Use Consumer Credit Wisely. FS–Si–BW–119 frames. Money Management Institute, Household Finance Corp.

Human Relations in Supervision. 24 FS–So–6 min. per filmstrip. McGraw-Hill.

I Want to Be A Secretary. MP–So–Col/BW–43 min. Coronet Instructional Films.

Information Machine, The. MP–So–Col–10 min. International Business Machines Corp.

Installment Buying. MP–So–BW–11 min. Coronet Instructional Films.

Interest—60 Day 6% Method—Parts I and II. FS–Si–BW. Business Education Films.

Introduction to Accounting. MP–So–BW–15 min. Business Education Films.

Is There Communication When You Speak? MP–So–Col/BW–17 min. McGraw-Hill.

It Must Be Somewhere. MP–So–BW–30 min. Remington-Rand, Division of Sperry-Rand Corp.

Journey for Miss James. MP–So–Col–6 min. National Secretaries Association.

Know Your Typewriter. MP–So–Col/BW–11 min. Coronet Instructional Films.

Littlest Giant, The. MP–So–BW–14 min. Association Films, Inc.
Look It Up! (Dictionary Habits.) MP–So–Col/BW–11 min. Coronet Instructional Films.
Machine Transcription-Machine Operations. MP–So–BW–15 min. United World Films.
Magic Window-Principles of Punched Card Accounting, The. FS–So–Col. International Business Machines Corp.
Man-Machine Charts. MP–So–BW–22 min. State University of Iowa.
Manner of Speaking, A. MP–So–Col/BW–28 min. Indiana Bell Telephone Co.
Meaning of Percentages. MP–So–BW–10 min. Business Education Films.
Message to No One, A. MP–So–Col–25 min. Champion Paper and Fiber Co.
Methods Analysis. MP–So–BW–10 min. McGraw-Hill.
Mimeograph Techniques. MP–So–15 min. Bailey Films.
Modern Business Machines. MP–So–20 min. Teaching Aids Exchange.
More Than Words. MP–So–Col/BW–14 min. Henry Straus and Co.
Office Courtesy—Meeting the Public. MP–So–Col/BW–12 min. Encyclopaedia Britannica Films, Inc.
Office Etiquette. MP–So–15 min. Encyclopaedia Britannica Films, Inc.
Office Supervisor's Problems. Six 8 min. films with discussion leader's manual. MP–So–Col/BW. McGraw-Hill.
Office Supervisor's Problems Series, The. 6 MP–So–Col. McGraw-Hill.
Office Teamwork. MP–So–Col/BW–12 min. Encyclopaedia Britannica Films, Inc.
Pay to the Order of. MP–So–10 min. Public Relations Council, American Bankers Association.
Percents and Percentage Series. FS–So–Col/BW. Society for Visual Education, Inc.
Personal Financial Planning. MP–So–Col–11 min. Association Films, Inc.
Personal Qualities to Job Success. MP–So–11 min. Coronet Instructional Films.
Polish Up Your Personality. FS–Si–Col. Society for Visual Education, Inc.
Posting—One Journal, One Ledger. FS–Si. Business Education Films.
Principles of Electronic Data Processing. FS–So–Col. International Business Machines Corp.
Process Charts. MP–So–BW–16 min. State University of Iowa.
Production 5118. MP–So–Col–28 min. Champion Paper Co.
Retail Accounts Receivable. FS–So–Col. International Business Machines Corp.
Say What You Mean. MP–So–Col–20 min. McGraw-Hill.
Secretarial Etiquette. FS–Si. Business Education Films.
Secretarial Training Series. 12 FS–So. McGraw-Hill.
Secretary: A Normal Day, The. MP–So–Col–20 min. Business Education Films.
Secretary as a Receptionist. FS–Si. McGraw-Hill.
Secretary Taking Dictation, The. MP–So–Col/BW–10 min. Coronet Instructional Films.
Secretary Transcribing, The. MP–So–Col/BW–10 min. Coronet Instructional Films.
Shortcuts in Typing. MP–So–30 min. Educators Progress Service.
Small World of John J. Pennyfeather, The. MP–So–Col–50 min. Employers Mutual of Wausau.
Sound Business. FS–So–BW. Continental Illinois National Bank and Trust Co.
Super Secretary, The. 2 FS–So–20 min. National Foreman's Institute, Inc.
Supervisory Problems in the Office. 12 FS–So–8-11 min. per filmstrip. McGraw-Hill.
Systems Analysis. FS–So–Col–13 min. Standard Register Co.
Take a Letter, Miss Brown. MP–So–Col–23 min. Stenotype Co.
Ten-Key Touch Training Course. 25 FS–Si–BW. (Operators and instructor manuals) Educational Developmental Laboratories.
Then and Now. MP–So–Col–12 min. Univac Division of Sperry-Rand Corp.
Thinking Machine, The. MP–So–BW–54 min. Association Films.
"Thinking" Machines. MP–So–Col–20 min. University of California.
This Business of Numbers. FS–So–Col–20 min. Remington Rand Division of Sperry-Rand Corp.
This Business of Numbers. FS–So–Col–20 min. Univac Division of Sperry-Rand Corp.
Tips on Typing. MP–So–21 min. Underwood Corp.
Tricks of the Trade for Typists. MP–Si–15 min. Teaching Aids Exchange.
Typing-Keyboard Introduction Course, 2nd ed. 10 FS–Si–BW. (Student and teacher manuals) Educational Developmental Laboratories.
Typing-Skill Development Course. 25 FS–Si–BW. (Student and teacher manuals) Educational Developmental Laboratories.
UNA and the UNIVAC. FS–So–Col–16 min. Univac Division of Sperry-Rand Corp.
What Is a Corporation? MP–So–Col/BW–11 min. Coronet Instructional Films.
What Is EDP? MP–So–Col–13 min. International Business Machines Corp.
Why Punctuate? MP–So–11 min. McGraw-Hill.
Why Use of Credit? MP–So–Col–11 min. Association Films, Inc.
Writing Better Business Letters. MP–So–Col/BW–10 min. Coronet Instructional Films.
Your Telltale Voice. MP–So–Col–18 min. Bell Telephone Co.
You're on the Team. MP–So–Col–20 min. Eastman Kodak Co.

ADDITIONAL INSTRUCTIONAL MATERIALS

Audio-Visual Aids. (Annual catalog of films in data processing.) Data Processing Management Association.
Automation Dictionary (Booklet). Minneapolis-Honeywell Regulator Co., Industrial Division.
Bookkeeping Procedure Visualized. (21½" x 27½" chart, B/W) National Blank Book Co.
Bookkeeping Transparencies. (8" x 10" for overhead projector) South-Western.
Bookkeeping Wall Charts. (48" x 52", 3 colors) George F. Cram Co., Inc.
Cartoons. (8¼" x 10" for typing) National Association of Secondary School Principals.

Cartoons. (8½" x 11") Ohio Typewriter Service.

Cartoons. (8" x 10", B/W for bookkeeping) Special Teaching Aids.

Case of the New, New Ribbon, The. (30" x 40" poster, Col) Poster Visual Aids.

Dictation Discs. Dictation Disc Co.

Facts for Math. (Teacher's reference) Automobile Manufacturers Association.

Filing Simplified. (17" x 22", Col) Smead Manufacturing Co.

Good Posture Charts. (11" x 17", Col) Adjusto Equipment Co.

Gregg Typing Picture-Posters—Letter Style Series. McGraw-Hill.

Gregg Typing Records—Keyboard Series—Boxes 1–4 inclusive. McGraw-Hill.

Keyboard Wall Chart. Education Research Committee.

Learn Your Legal Terms. Kerlin Graphics Co.

Making a Good Impression on Your Master. Addressograph Multigraph Corp.

Motivation Chart for Shorthand. (22" x 32", Col) Teaching Aids Exchange.

Office Etiquette. Ladies Home Journal.

Office Experience-Typewriters. (Demonstration Kit, 40 mins.) Underwood Corp.

Production Typewriting, Monograph 97. (For teachers) South-Western.

Shorthand by Sound. (Record series) Sound Education.

Shorthand Cartoons (8" x 10", B/W) Special Teaching Aids.

Social Security Charts. (Kits, 32" x 44" charts, teacher pamphlets) Internal Revenue Service.

Successful Secretary, The. (Booklet). Royal McBee Corp.

Table Manners. Ladies Home Journal.

Teletrainer Equipment and Materials. Bell Telephone Co.

Typewriter Keyboard Chart. (2⅜" x 13") E. D. Crim Publications.

Typewriter Keyboard Chart. (21⅜" x 13") E. D. Crim Publications.

Typewriter Keyboard Test. R. C. Allen Business Machines, Inc.

Typewriter Kit No. 1. (Posters, Col) Educational Supplies and Services.

Typewriter Placement Tests. (For teachers) South-Western.

Typewriting Rhythm Records—Progressive Speed Series. McGraw-Hill.

Typing Cartoons. (8½" x 11", red and black) Poster Visual Aids.

Typing Habits, Ugh! (8" x 10") Poster Visual Aids.

Typingo. (Typing game) Russell W. Kraning.

What Every Typist Should Know About Copies in Office Work. (Speed and accuracy tests) Ditto, Inc.

Your First Year of Teaching. Monograph 103. (For teachers) South-Western.

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